# CROSSROADS WIC PROJECT

## SYSTEM ADMINISTRATION USER MANUAL

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# OVERVIEW

## Document Overview

This manual will aid WIC administrative staff in learning about the function and use of the System Administration module of the Crossroads WIC System. The System Administration module is a comprehensive solution to help users manage a variety of administrative tasks such as creating user accounts and assigning security permissions, creating dashboards, and configuring system settings. Major functions of this module include the following:

- **Working with User Accounts** – Used to create user accounts and assign security permissions to users for their work locations.
- **Working with Dashboards** – Used to manage settings for the main Dashboard (the Crossroads WIC system home screen), the Finance Dashboard, and the Vendor Dashboard.
- **Managing Configuration Settings** – Used to define system settings for functions throughout the Crossroads WIC system that will be applied to all users.
- **Managing Education** – Used to define and edit education details for individual users.

### Manual Content

This manual includes the following components organized in the order indicated:

- **Table of Contents (TOC)** – Lists each documented training scenario included in this manual. The TOC is organized to complement the delivery of instructor-led, classroom training. Similar scenarios are grouped together by major system functions. Use the TOC to look up training scenarios first by function and then by scenario title.
- **Training Manual Overview** – Outlines the content of this manual and explains how this manual can be used. It includes information about the general structure of this manual and tips to help you get the most out of it.
- **Training Scenarios** – Covers situations that one might encounter in a typical day. Each scenario walks you through an entire process. Scenarios connect the individual tasks necessary to complete a process. The scenarios were written and organized to facilitate an instructor-led training session, but the scenarios can be used as reference guides after your training is complete.

### Conventions and Features

This manual follows certain conventions that make it easy for you to use the materials presented and includes the following features that help you identify similar information from one topic to another:

- Training scenarios are grouped together by major system functions, so that you can locate the desired scenario more easily.
- Each training scenario begins with an Overview section that includes an explanation of what is covered within the scenario, so you'll know from the start what you'll be learning.
- Training scenarios are documented using Tasks and Steps. A Task is a major activity in a larger process and indicates a substantial portion of the overall process whereas a Step is one of several user actions within a Task.
- The manual provides Tasks and Steps for differing levels of detail. You can follow the list of Tasks (less detail) or you can go deeper and follow each Step of the process, click by click and action by action (more detail).
- Buttons you'll need to click and data you'll need to enter are accented in bold to help them stand out on the page, so that you can identify these items more easily.

- Pictures of application screens are included within each training scenario to help familiarize you with the screens. Data displayed in the pictures is intended for illustrative purposes only and does not represent live data. During classroom training, use the data supplied by the instructor. Outside of classroom training, enter the appropriate data as necessary to complete the task at hand.

Callout boxes help you find specific types of information quickly. The callout boxes are displayed and defined below.

### Notes

The notepad-and-pencil icon displays to the left of paragraphs that provide additional, and usually more detailed, information about the application. Sometimes the notes give you additional information about the screen you're working with, and sometimes the notes inform you where to find additional information elsewhere. Either way, it is well worth your time to watch for these helpful icons.

### Alternatives

| | |
|---|---|
| **Alternative I** | Alternative options are documented for certain training scenarios. Alternative options exist when the Tasks/Steps of a training scenario may vary based on a decision the user needs to make. |

| | |
|---|---|
| **Alternative II** | Both processes are similar, but have differences. Therefore, each process is documented independently from one another and includes the Task(s) and Steps necessary to complete the option selected. |

### Processes

| | |
|---|---|
| **Process I** | Process options are used within certain training scenarios. |

| | |
|---|---|
| **Process II** | Process options exist when several processes (which may be related or unrelated) are grouped together under one Table of Contents topic but are broken out separately in order to explain them. |

## Using This Manual

This manual can be used as a training manual during instructor-led, classroom training or as a reference guide once training is concluded. Use the table of contents (TOC) to locate a training scenario. Once you've located a specific training scenario, review the Overview section (at a minimum) to find out important details surrounding the scenario such as the starting point, type of data needed, and a summary of the Task(s) to be completed in the overall process. You can follow the associated Steps for more detail as needed.

# CHANGE PASSWORD AND LOCATION

## Changing and Setting the Password and Work Location

### Overview

The Change Password screen allows you to change your Crossroads WIC system password and select a security question and answer. The security question and answer will be used for validation if you forget your password and need it to be reset.

The Change Location screen is used to select or change a users work location in the Crossroads WIC System and to specify the default work location.

This process includes the following tasks:

Task A. Changing Your Password for the First Time

Task B. Setting Your Default Work Location

Task C. Changing Your Password after it has already been Established

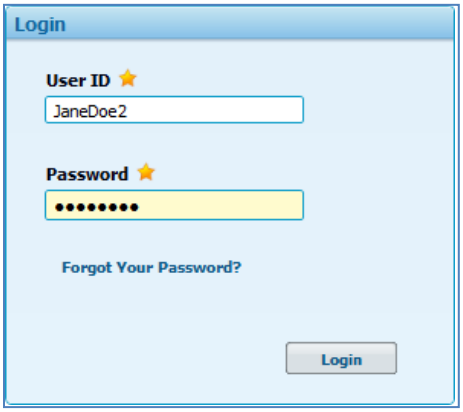
Task D. Changing Your Work Location

Task E. Changing Your Password if it has been Forgotten

## Task A. Changing Your Password for the First Time

Complete the following steps to perform this task:

1. Login to the Crossroads WIC application using your initial, system generated password. (For more details, refer to the Logging into the Crossroads WIC Application scenario.) The Change Password screen displays.




When a user account is first added to the Crossroads WIC system, an initial password is randomly generated.

If your State uses NCID or Active Directory, passwords may be maintained using an external system.

2. Change your password settings as follows:
   - Enter your **Current Password**.
   - Enter your **New Password**.
   - Enter your new password a second time in **Confirm New Password**.

Passwords must comply with the complexity settings established in the User Security

Configuration screen. These settings may vary.

- Select a **Security Question**.
- Enter your **Security Question Answer**.

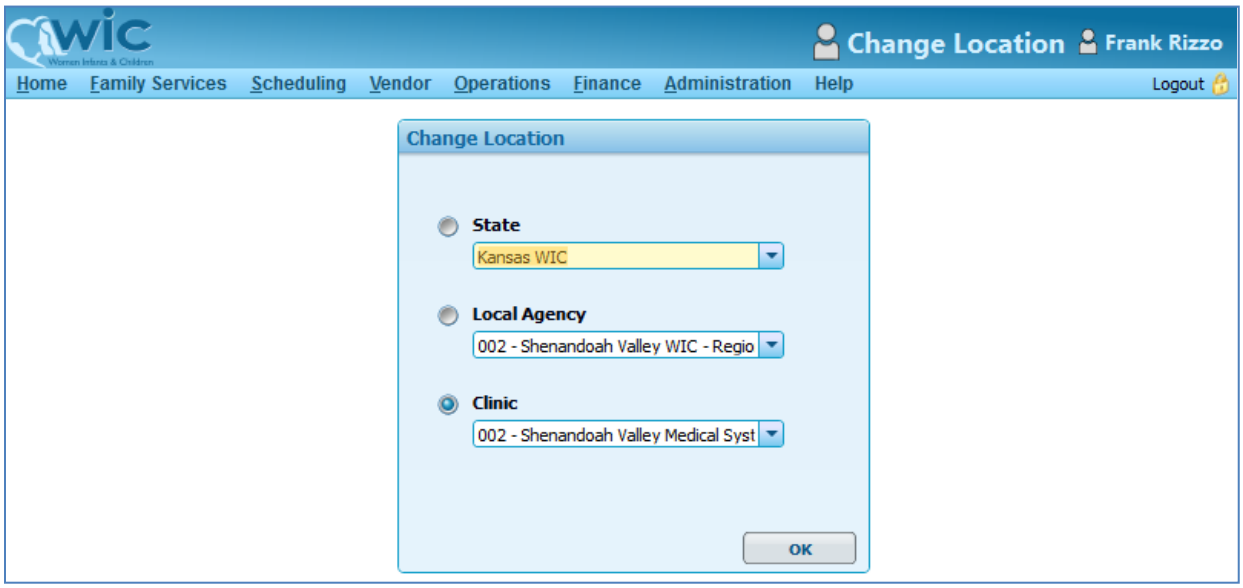
The available Security Questions are determined by the selections in the User Security Configuration screen. These settings may vary.

3. Click **OK** to process your changes. A status message displays.

## Task B. Setting Your Default Work Location

Complete the following steps to perform this task:

1. After changing your password for the first time (For details, refer to Task A of the current scenario), the Change Location screen displays with the work location defined for your user account.




If only one work location has been assigned to a user, the system bypasses the Change Location screen and navigates the user directly to the Home screen.

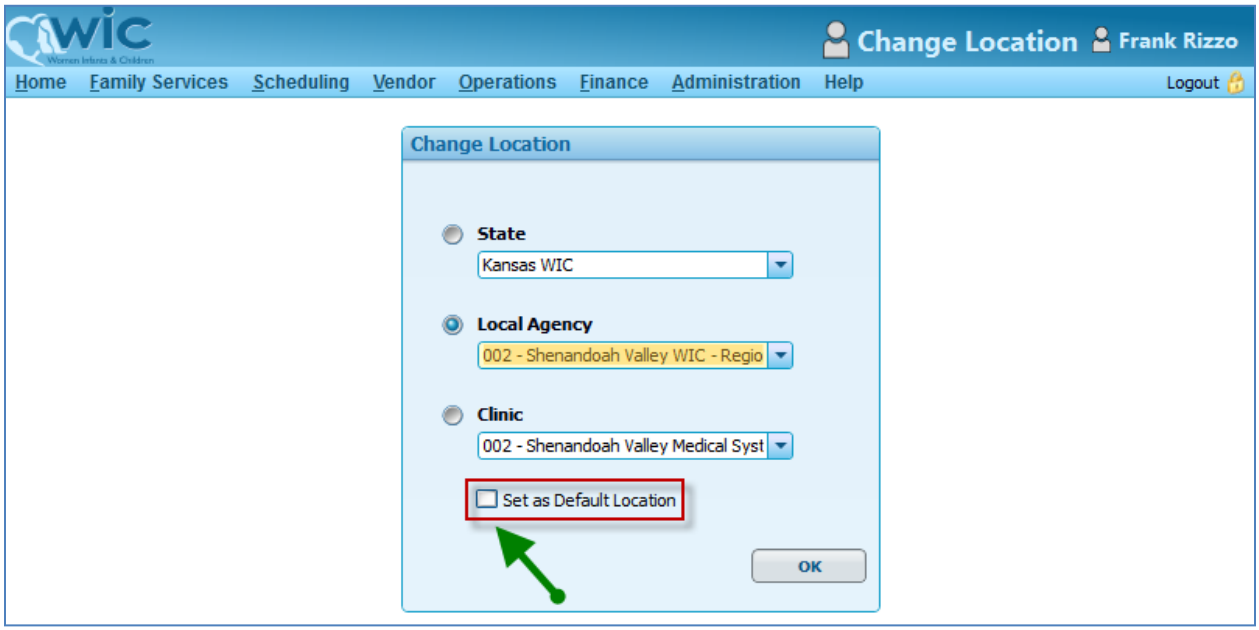
2. Change your **State** location, as needed.
3. Change your **Local Agency** location, as needed.

The Local Agency options will be limited by the State selected.

4. Change your **Clinic** location, as needed.

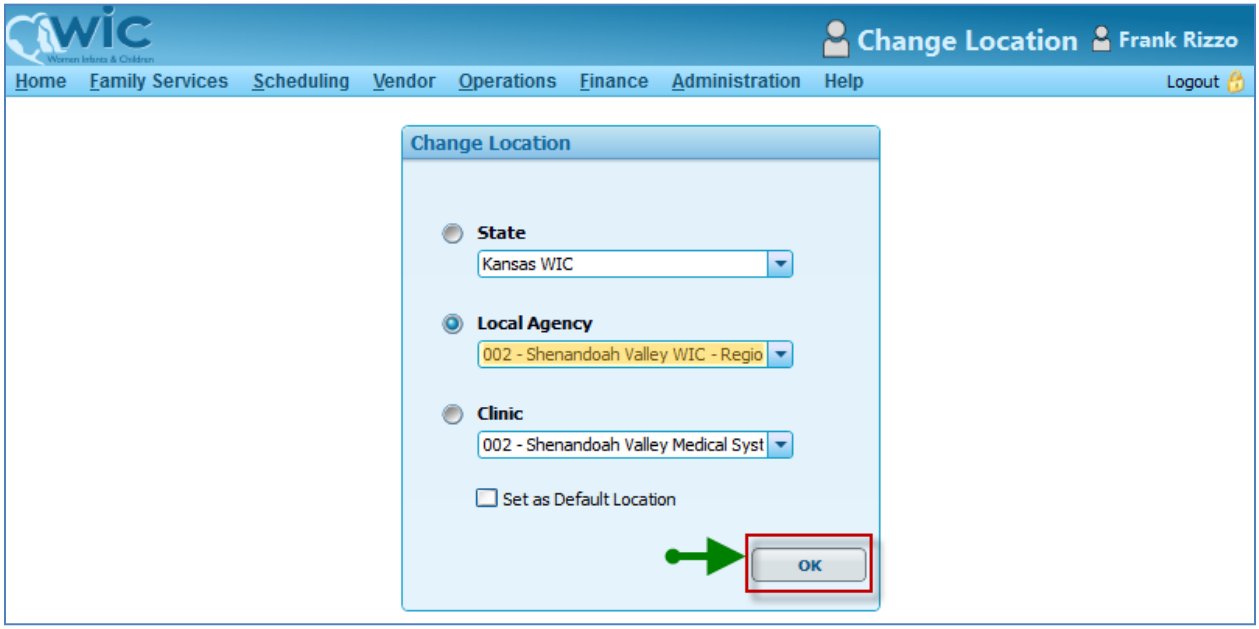
The Clinic options will be limited by the Local Agency selected.

5. Check **Set as Default Location** as needed.




Check Set as Default Location to bypass the Change Location screen during future login attempts and to sign in automatically at the selected default location.

6. Click **OK**. A status message displays.



## Task C. Changing Your Password after it has already been Established

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration** à **Change Password**. The Change Password screen displays.

2. Change your password settings as follows:
   - Enter your **Current Password**.
   - Enter your **New Password**.
   - Enter your new password a second time in **Confirm New Password**.

Passwords must comply with the complexity settings established in the User Security Configuration screen. These settings may vary.

   - Select or change your **Security Question**, as needed.
   - Enter or change your **Security Question Answer**, as needed.

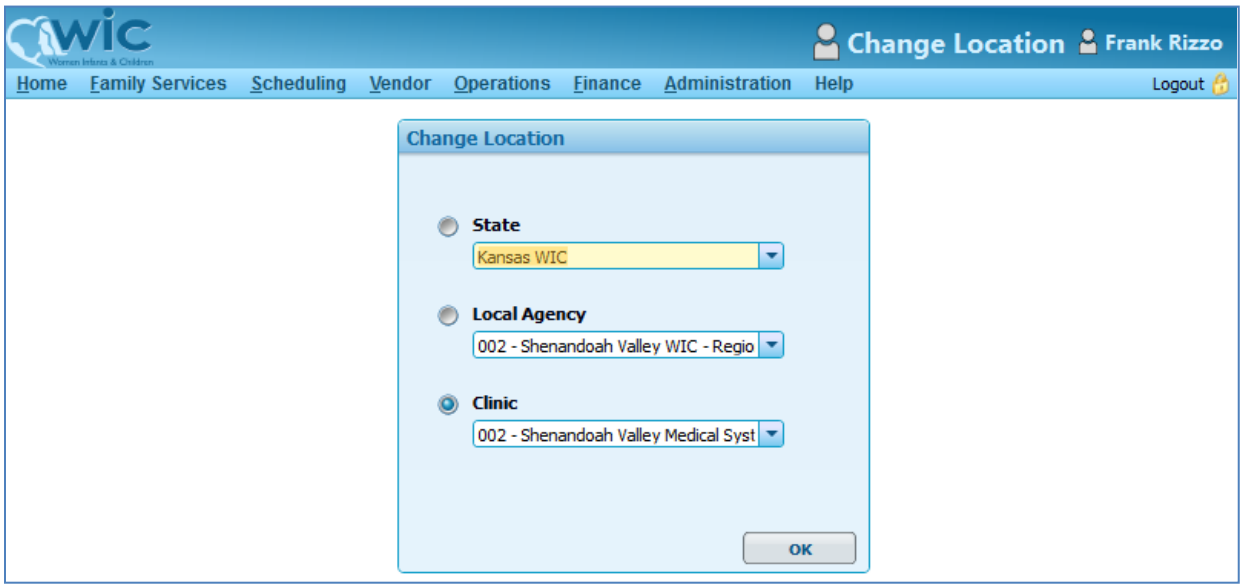
The available Security Questions are determined by the selections in the User Security Configuration screen. These settings may vary.

3. Click **OK** to process your changes. A status message displays.

## Task D. Changing Your Work Location

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration** à **Change Location**. The Change Location screen displays with your default location settings.




2. Change your **State** location, as needed.
3. Change your **Local Agency** location, as needed.

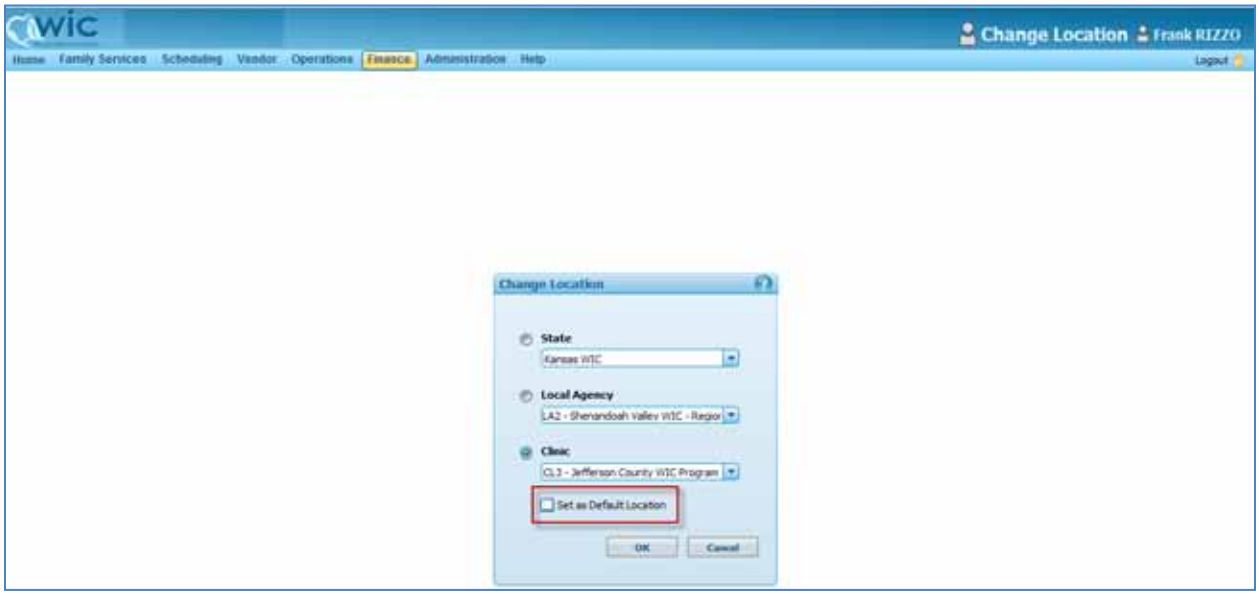
The Local Agency options will be limited by the State selected.

4. Change your **Clinic** location, as needed.

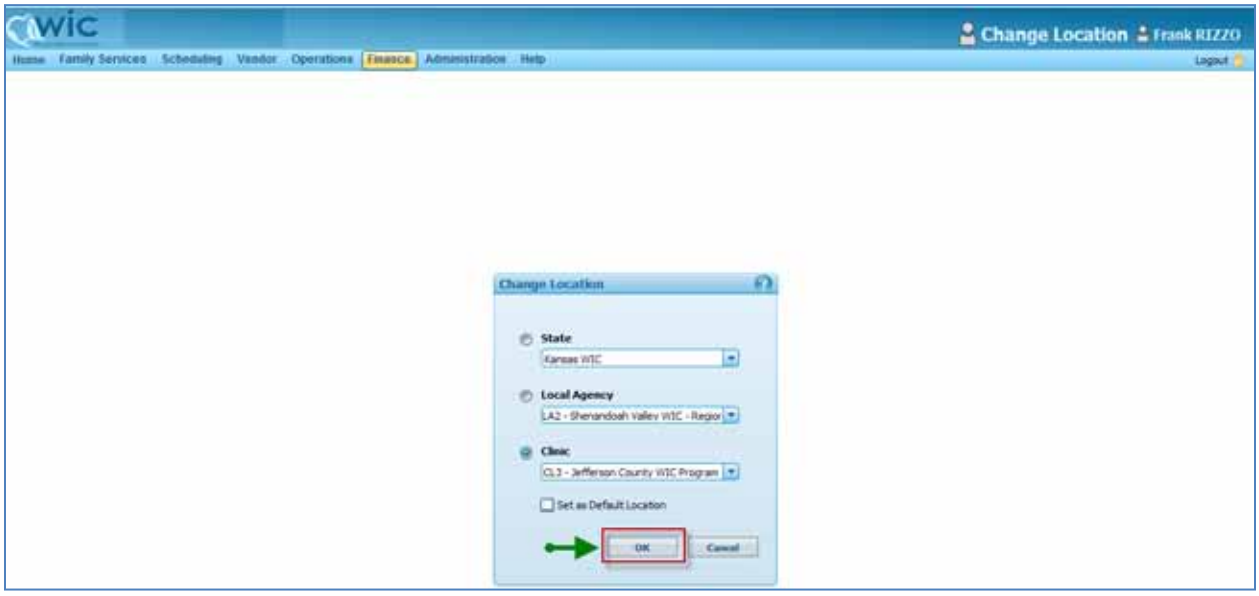
The Clinic options will be limited by the Local Agency selected.

5. Check **Set as Default Location**, as needed.

**Set as Default Location** is only displayed if changes are made to the **State**, **Local Agency**, and/or **Clinic** selections.




6. Click **OK** to process your changes. A status message displays.

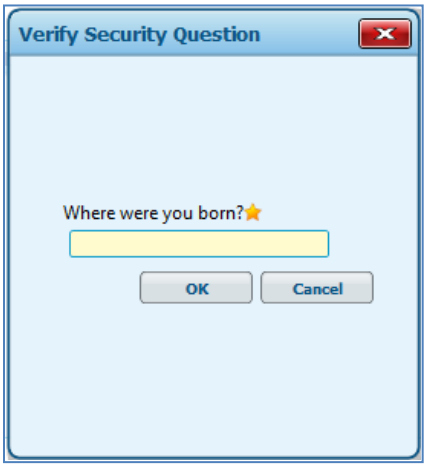


### Task E. Changing Your Password if it has been Forgotten

Complete the following steps to perform this task:

1. Access the Login screen. (For more details, refer to the Logging into the Crossroads WIC Application scenario.)

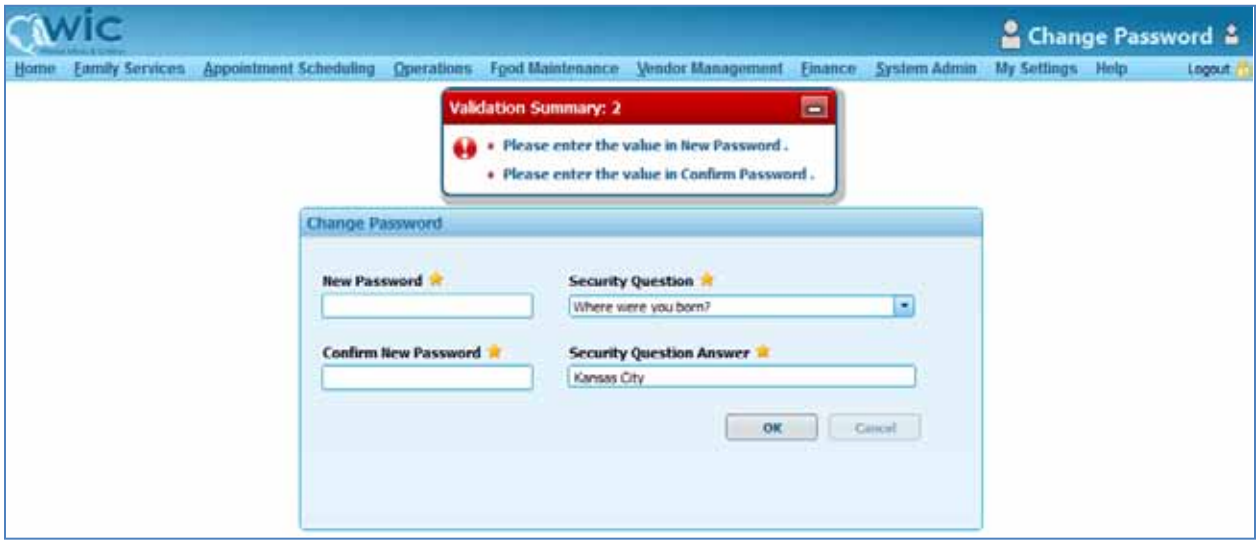
2. Enter your **User ID**.
3. Click **Forgot Your Password?**. The Verify Security Question screen displays.




4. Enter your **Security Question Answer**.

The Security Question displayed is determined by your earlier selection on the Change Password screen.

5. Click **OK**. The Change Password screen displays.




6. Change your password settings as follows:

   - Enter your **New Password**.
   - Enter your new password a second time in **Confirm New Password**.

Passwords must comply with the complexity settings established in the User Security Configuration screen. These settings may vary.

   - Select or change your **Security Question**, as needed.
   - Enter or change your **Security Question Answer**, as needed.

The available Security Questions are determined by the selections in the User Security Configuration screen. These settings may vary.

7. Click **OK** to process your changes. A status message displays.

## Congratulations!

You have successfully changed your password for the first time, set your default work location, changed your password again after initial setup, changed your work location, and changed your password after it was forgotten.

# SECURITY

## Searching, Adding, and Editing Users, Roles, and Location Assignment

### Overview

The User Search screen allows you to manage user accounts in the Crossroads WIC system. Use this screen to add new users or search for and modify existing user accounts.

This process includes the following tasks:

Task A. Adding a New WIC Staff User Account

Task B. Adding a New External Participant User Account

Task C. Searching for an Existing User Account

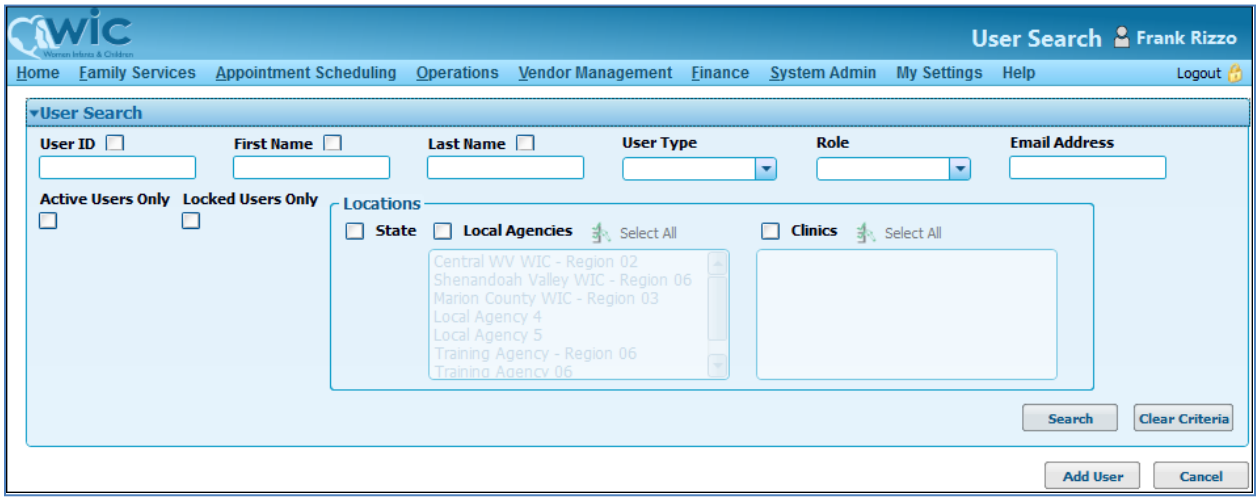
Task D. Modifying an Existing WIC Staff User Account

Task E. Modifying an Existing External Participant User Account

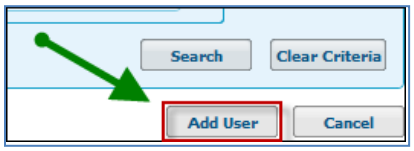
## Task A. Adding a New WIC Staff User Account

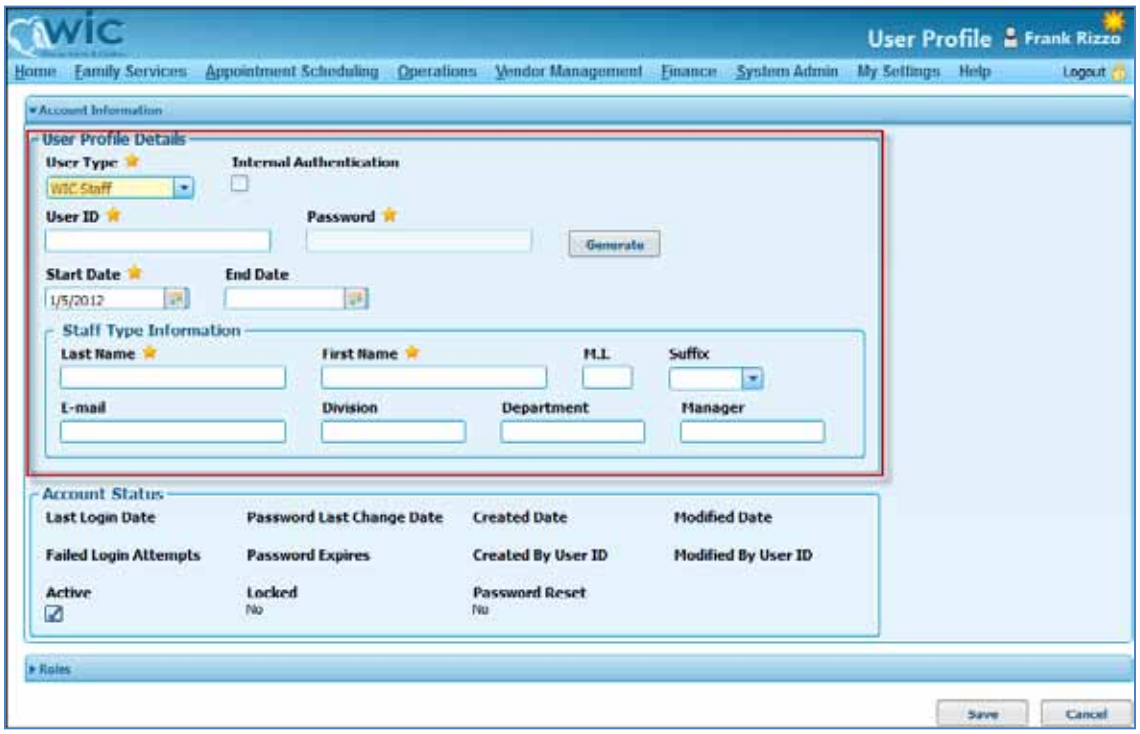
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Security à Search Users**. The User Search screen displays.




2. Click **Add User**. The User Profile screen displays.

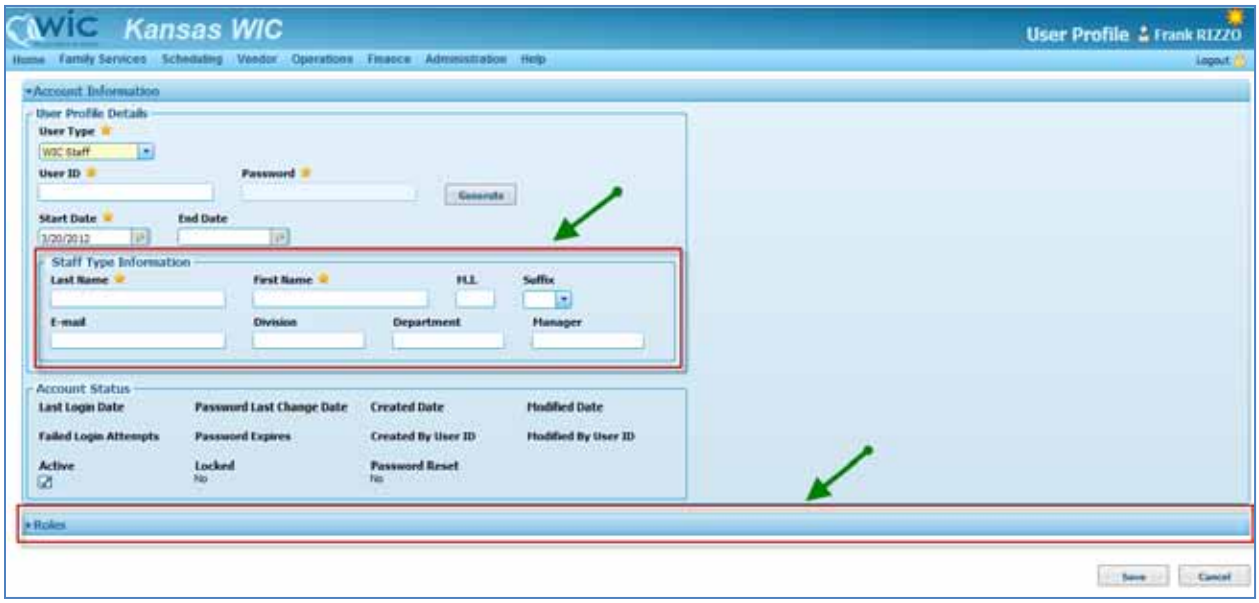


3. Under Account Information, complete the User Profile Details section for the new user account by doing the following:

   · Select the User Type: **WIC Staff**.

When the **WIC Staff** User Type is selected, the Staff Type Information group box and Roles section display on the screen. This section is only applicable to WIC Staff user accounts.



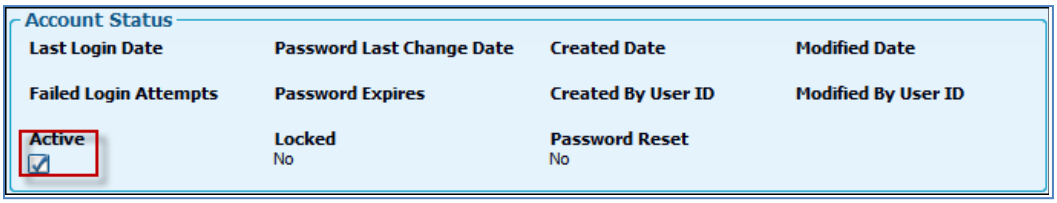

   · Enter the **User ID**.
   · Click **Generate** to automatically generate a random password.

Randomly generated passwords comply with the Password Complexity Rule settings established in the User Security Configuration screen. When the user logs into the Crossroads WIC System for the first time, he or she will be prompted to create a new password.

If your State uses NCID or Active Directory, Passwords may be maintained using an external system.

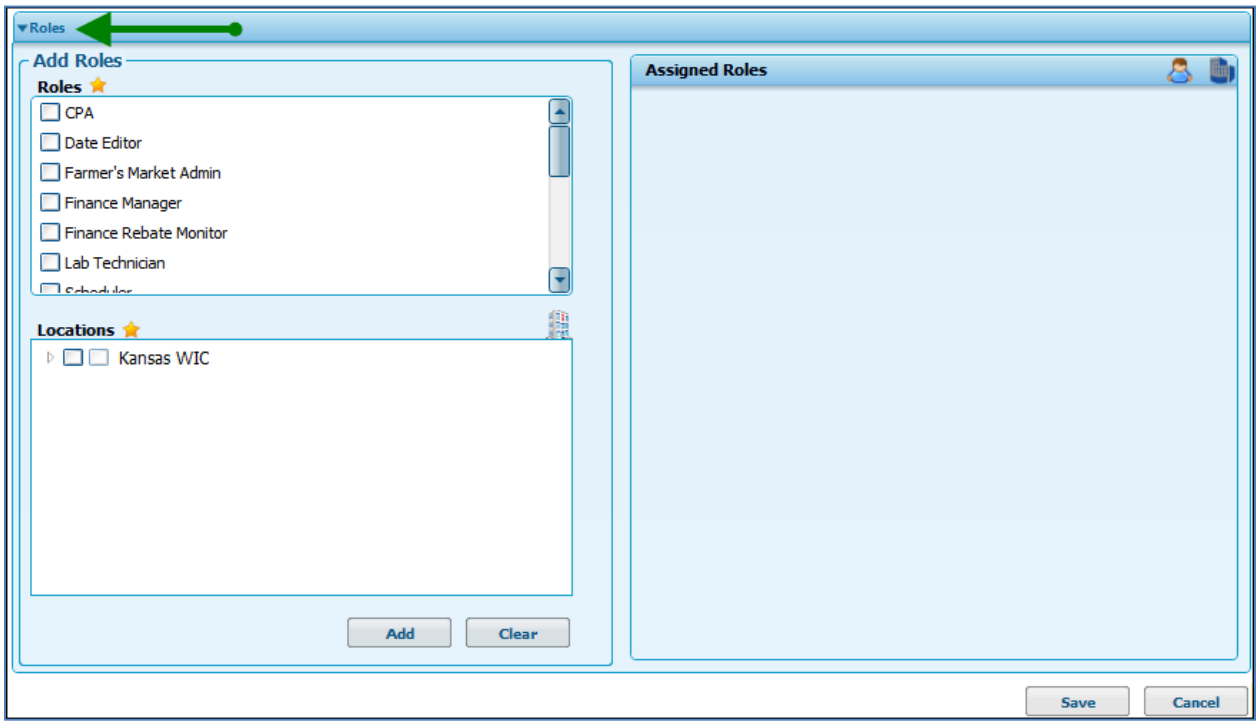
- Enter the **Start Date**. This is the first day on which the User ID is valid.
- Enter the **End Date**, if needed. This is the last day on which the User ID is valid.
- Enter the user's **Last name**, **First Name**, **Middle Initial**, and **Suffix**.
- Enter the user's **E-mail** address, if needed.
- Enter the user's **Division**, **Department**, and **Manager**, if needed.

4. Uncheck **Active** in the Account Status section if you wish to deactivate the user account.

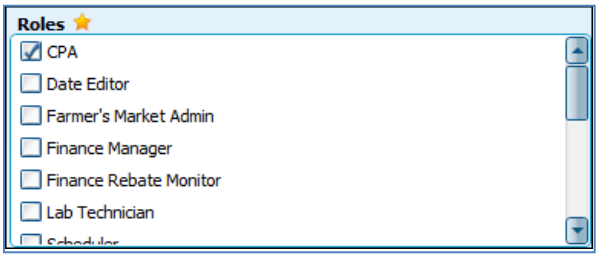



The user account is **Active** by default. The other items in the Account Status section are provided for informational purposes only and cannot be changed.

5. Expand the Roles section by clicking the expand/collapse arrow.



6. Select one or more roles from the available list.




At least one role must be assigned to WIC Staff users before the new user account can be saved.

7. Select one or more locations to which the roles will be assigned:

   · Click the **Select All Clinics** icon to select all available clinics.

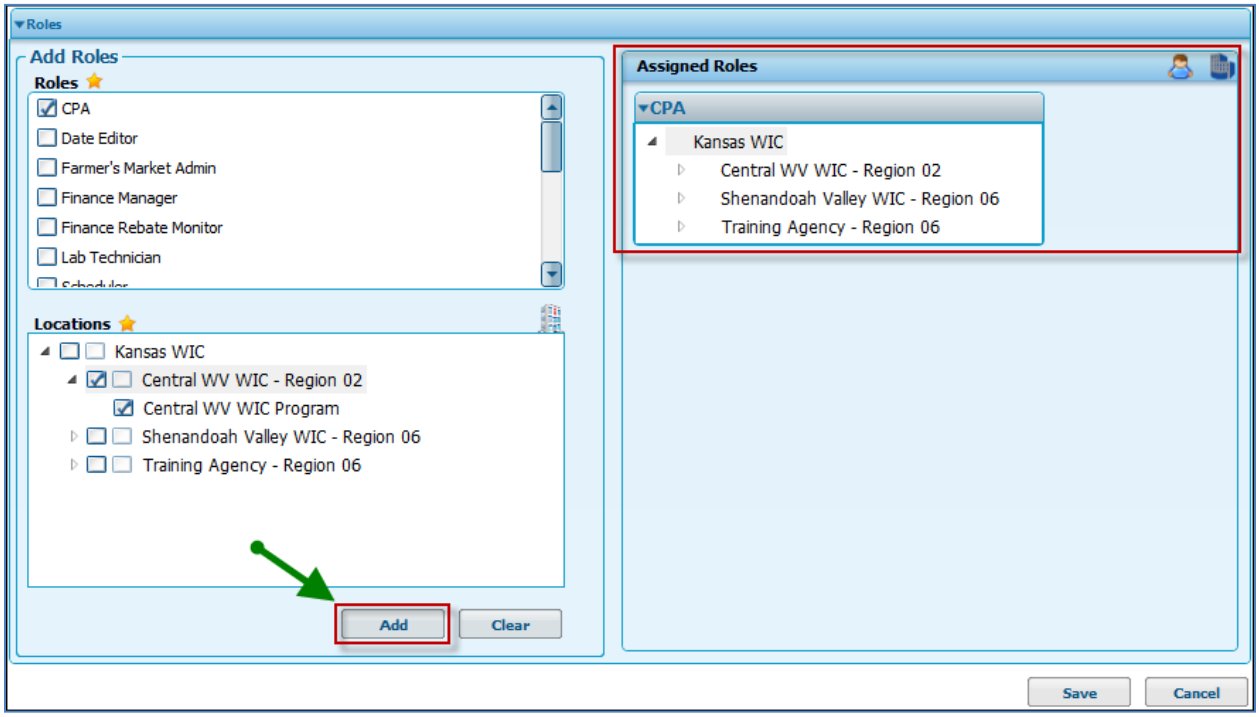
This icon displays after the regions have been expanded by clicking the expand/collapse arrows.

Locations
Kansas WIC
Central WV WIC - Region 02
Central WV WIC Program
Shenandoah Valley WIC - Region 06
Training Agency - Region 06

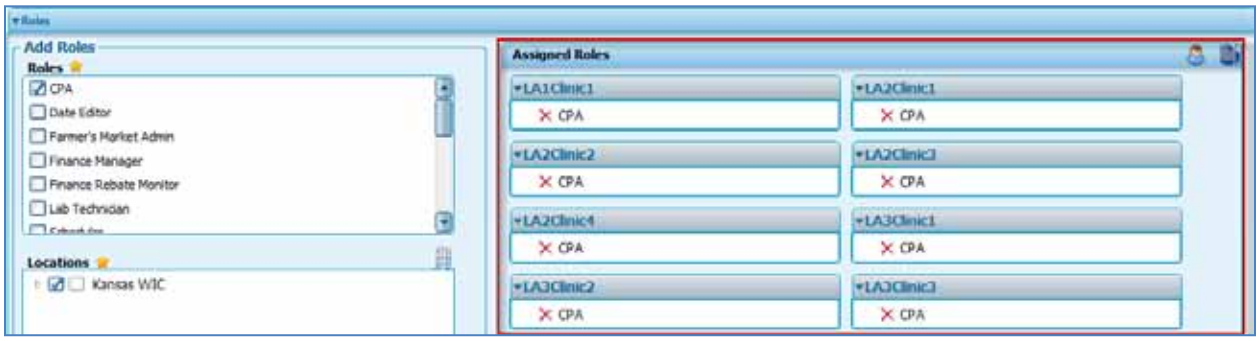
The level at which roles can be assigned depends on the permissions of the logged on user. If the user is signed in at the State level, all State locations will be displayed. If the user is signed in at the agency level, State level assignment is not available. If the user is signed in at the clinic level, only individual clinic assignments are available.

8. Click **Add**. The locations to which the selected roles have been assigned will be added to the Assigned Roles section.

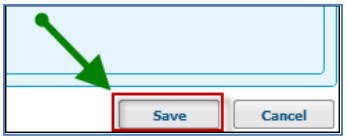
   - Click the **Sort by Roles** icon to sort the assignments by role.




   - Click the **Sort by Location** icon to sort the assignments by location.



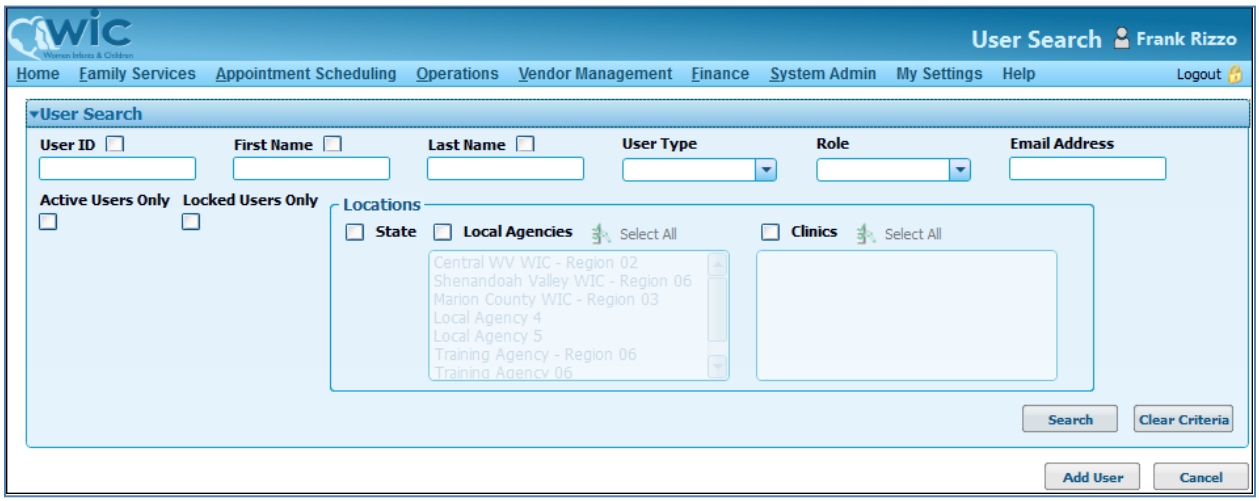

9. Click **Save**. A status message displays.



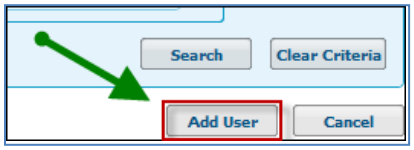
## Task B. Adding a New External Participant User Account

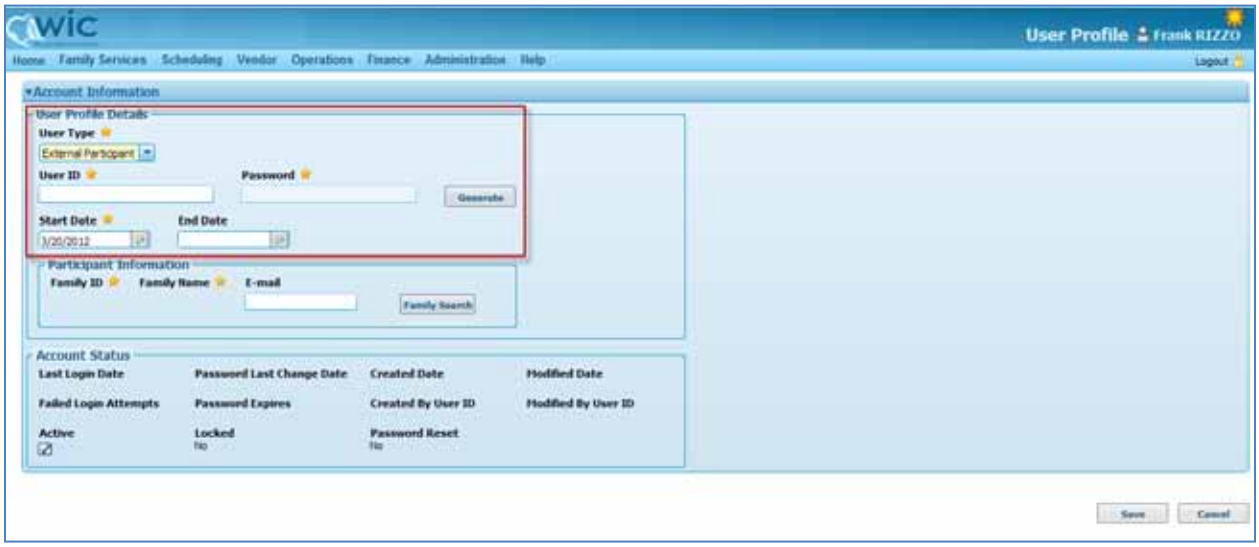
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Security à Search Users**. The User Search screen displays.




2. Click **Add User**. The User Profile screen displays.



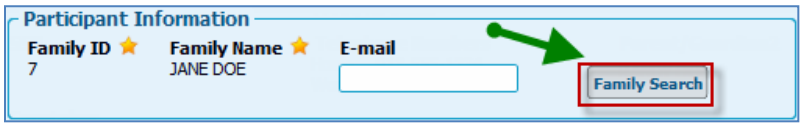



3. Under Account Information, complete the User Profile Details section for the new user account by doing the following:
   - Select the User Type: **External Participant**.
   - Enter the **User ID**.
   - Click **Generate** to automatically generate a random password.

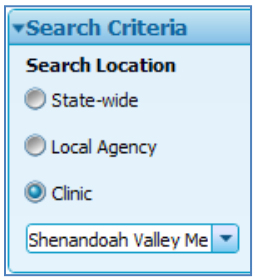
> Randomly generated passwords comply with the Password Complexity Rule settings established in the User Security Configuration screen. When the user logs into the Crossroads WIC System for the first time, he or she will be prompted to create a new password.
>
> If your State uses NCID or Active Directory, Passwords may be maintained using an external system.

   - Enter the **Start Date**. This is the first day on which the User ID is valid.
   - Enter the **End Date**, if needed. This is the last day on which the User ID is valid.

4. Click **Family Search** to search for a family record. The Family Search screen displays.

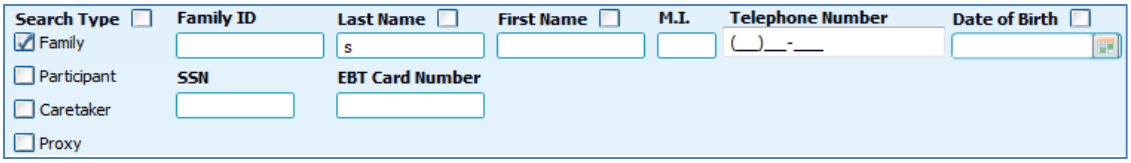


5. Under Search Criteria, select the desired **Search Location**.

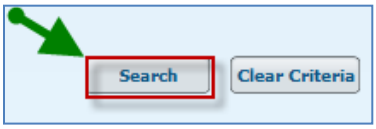



> Search Location can be refined by using the set of radio buttons and the associated drop-down list.

6. Under Search Type, check one or more boxes (Family, Participant, Caretaker, and/or Proxy) and enter or select the desired search criteria.



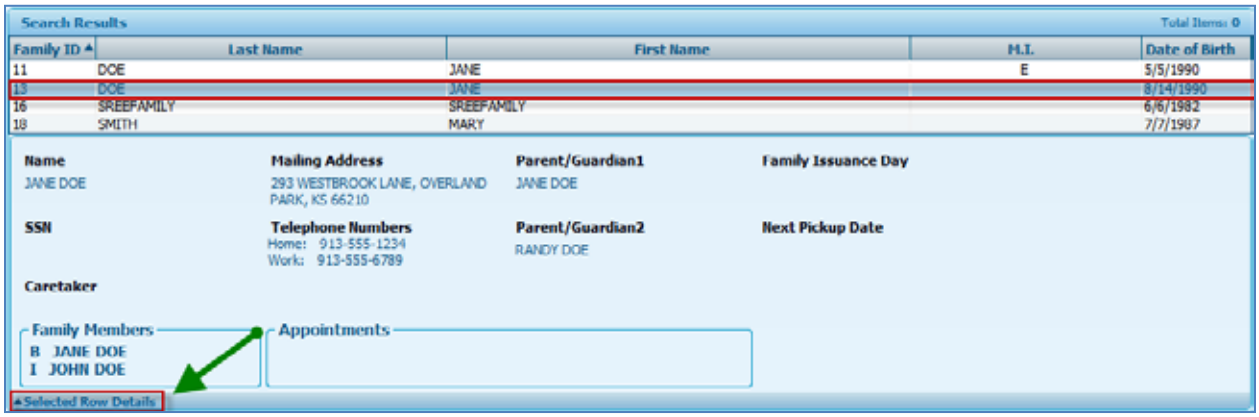

7. Click **Search.** The screen is refreshed and displays the results in the Search Results grid.



Click a column header to sort the results of the search (example below).

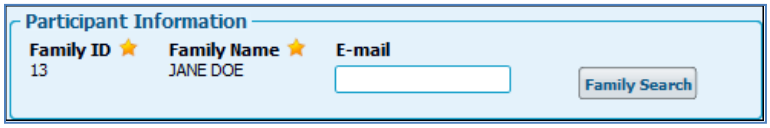
Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid (not shown).

Select a row in the grid and click Selected Row Details to view detailed information about the selected record.

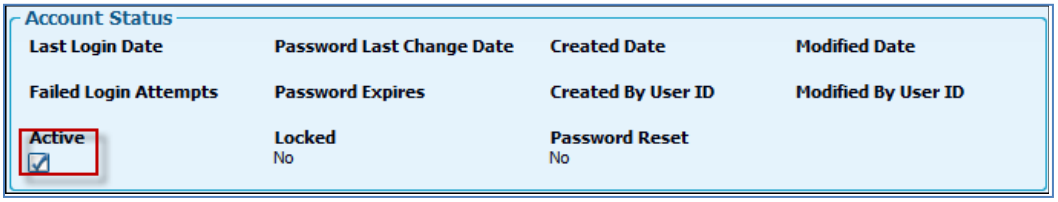


8. Double-click on a row in the grid to select the external participant. The Account Information screen displays.

The Participant Information section will be updated with the selected **Family ID** and **Family Name**.

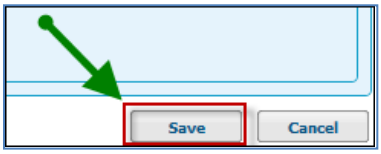



9. Enter the user's **E-mail** address, if needed.
10. Uncheck **Active** in the Account Status section if you wish to deactivate the user account.




The user account is **Active** by default. The other items in the Account Status section are provided for informational purposes only and cannot be changed.

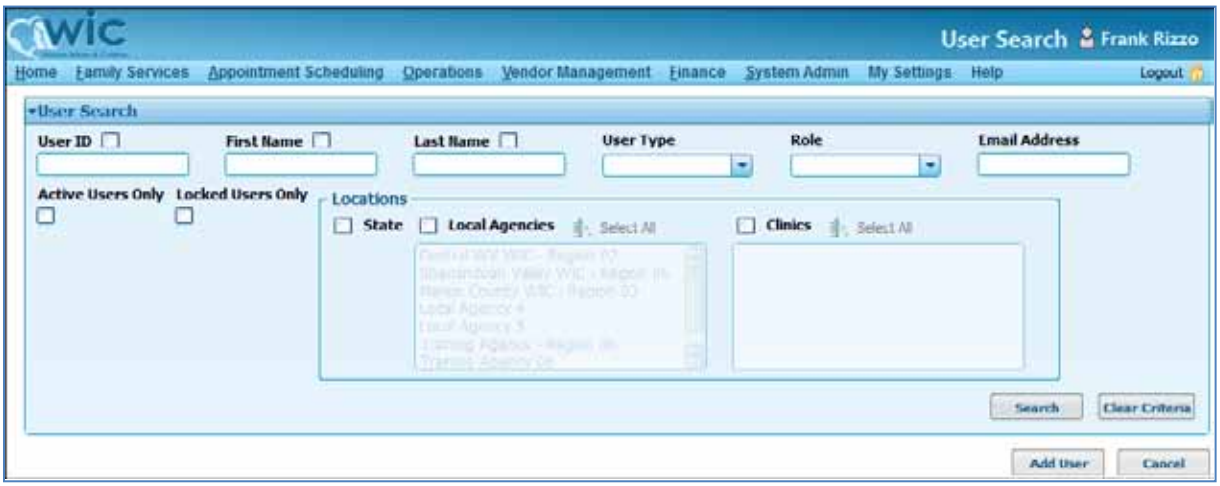
11. Click **Save**. A status message displays.



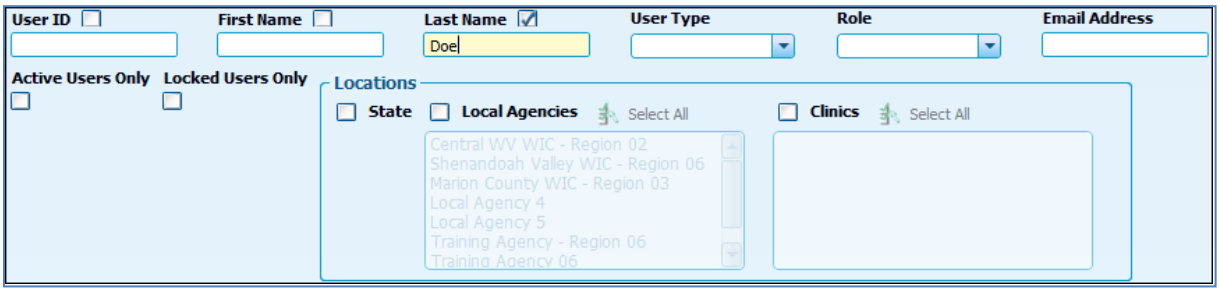
## Task C. Searching for an Existing User Account

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Security à Search Users**. The User Search screen displays.




2. Enter or select the desired search criteria.

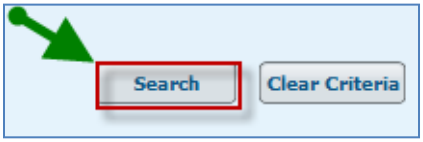


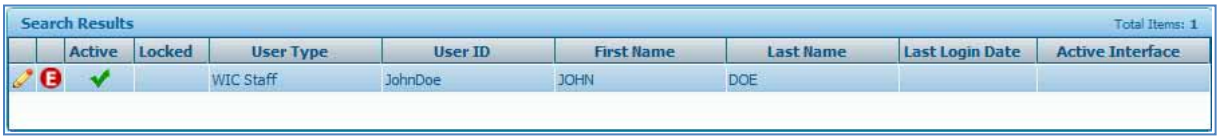
Check the User ID, First Name, and Last Name box to conduct an exact match search on the value entered.

Check Active Users Only and/or Locked Users Only as needed.

Check State, Local Agencies, or Clinics to conduct a search by location.

3. Click **Search.** The screen is refreshed and displays the results in the Search Results grid.





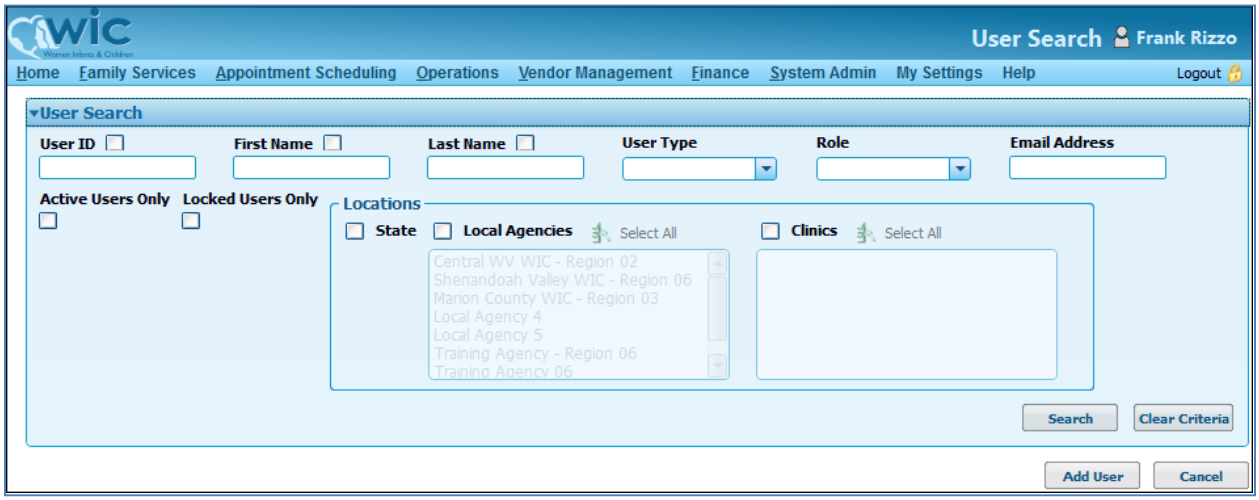

Click a column header to sort the results of the search.

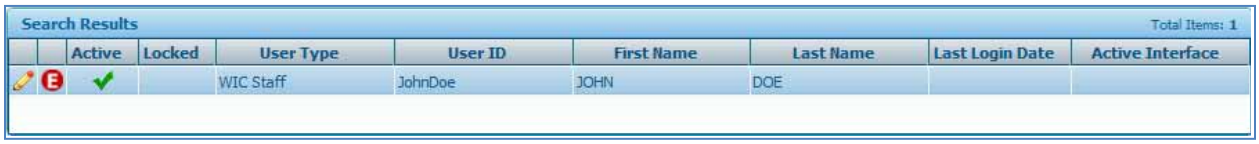
Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

## Task D. Modifying an Existing WIC Staff User Account

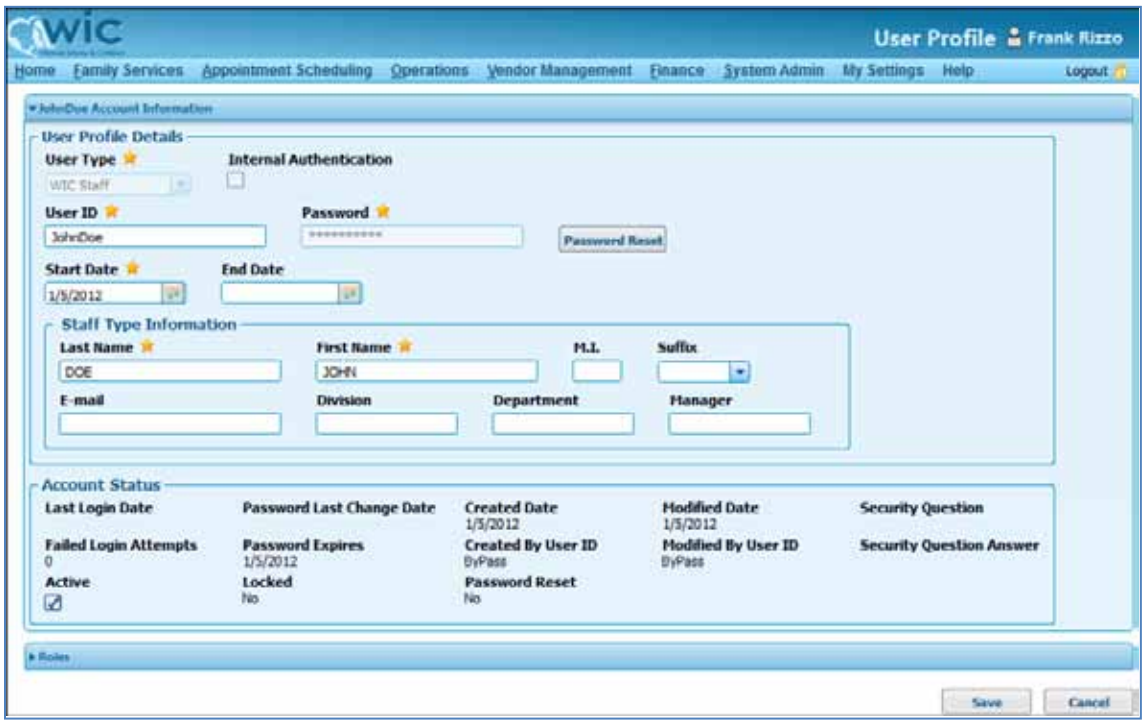
Complete the following steps to perform this task:

1. Search for a WIC Staff User Account on the User Search page. (For details, refer to Task C of the current scenario.)



2. Double-click on a row in the grid or click the pencil icon to modify the user record. The User Profile screen displays.



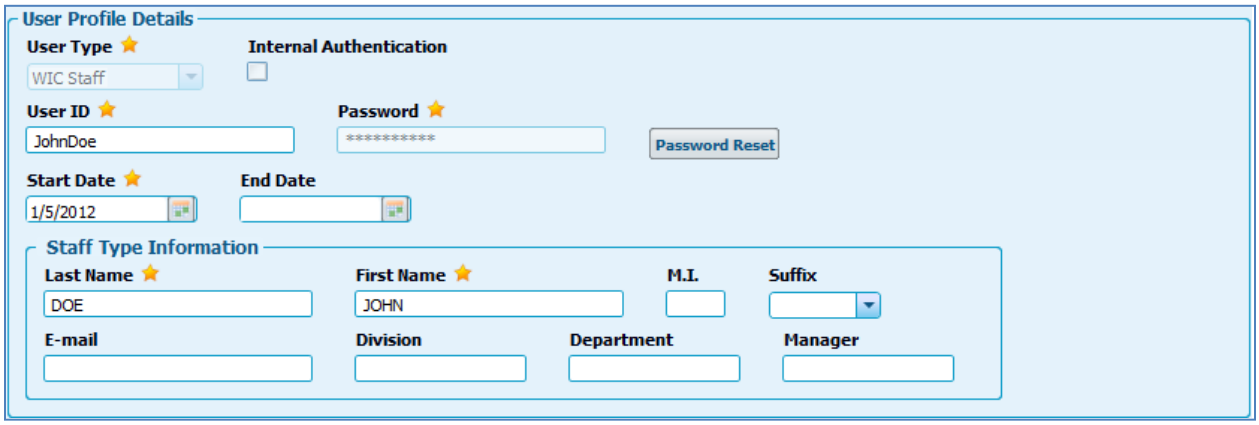

3. For WIC Staff users, update the User Profile Details section for the existing user account by modifying the following as needed:

   - Edit the **User ID**.
   - Click **Password Reset** to automatically generate a random password.

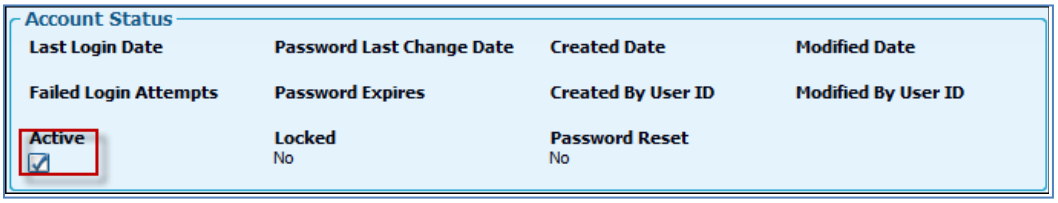
Randomly generated passwords comply with the Password Complexity Rule settings established in the Security Configuration screen. When the user logs into the Crossroads WIC System for the first time, he or she will be prompted to create a new password.

If your State uses NCID or Active Directory, Passwords may be maintained using an external system.

- Edit the **Start Date**. This is the first day on which the User ID is valid.
- Edit the **End Date**. This is the last day on which the User ID is valid.
- Edit the user's **Last Name**, **First Name**, **Middle Initial**, and **Suffix**.
- Edit the user's **E-mail** address.
- Edit the user's **Division**, **Department**, and **Manager**.



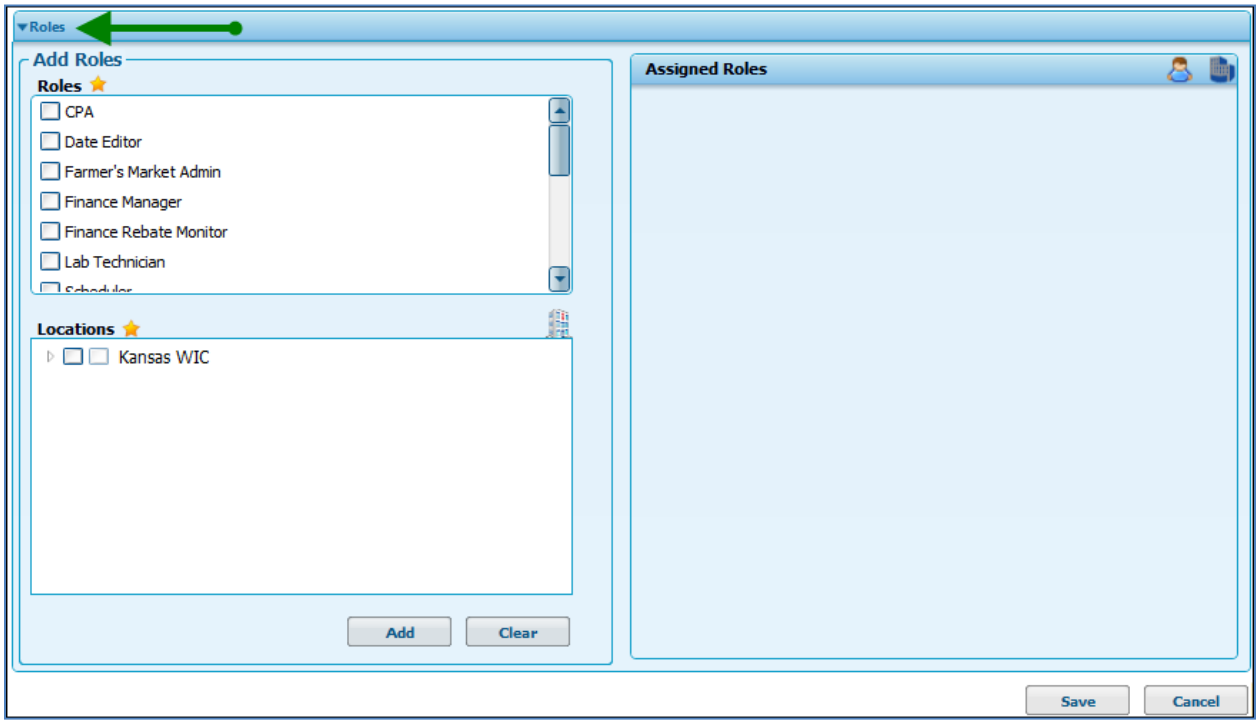

4. Uncheck **Active** in the Account Status section if you wish to deactivate the user account.



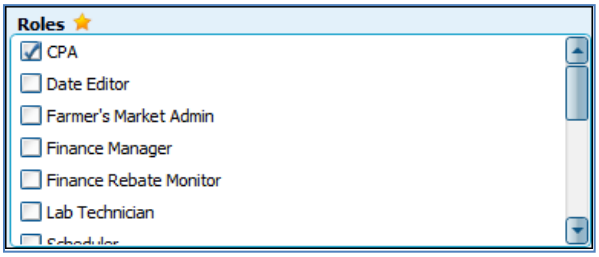

The user account is **Active** by default. The other items in the Account Status section are provided for informational purposes only and cannot be changed.

5. Expand the Roles section by clicking the expand/collapse arrow.

The Roles section is only applicable to WIC Staff user accounts. If **External Participant** is selected as the User Type, this section will not be visible.



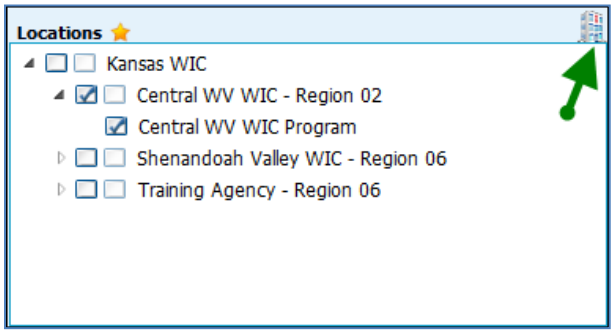

6. Select one or more roles from the available list.



At least one role must be assigned to WIC Staff users before the updated user account can be saved.

7. Select one or more locations to which the roles will be assigned:
   - Click the **Select All Clinics** icon to select all available clinics.

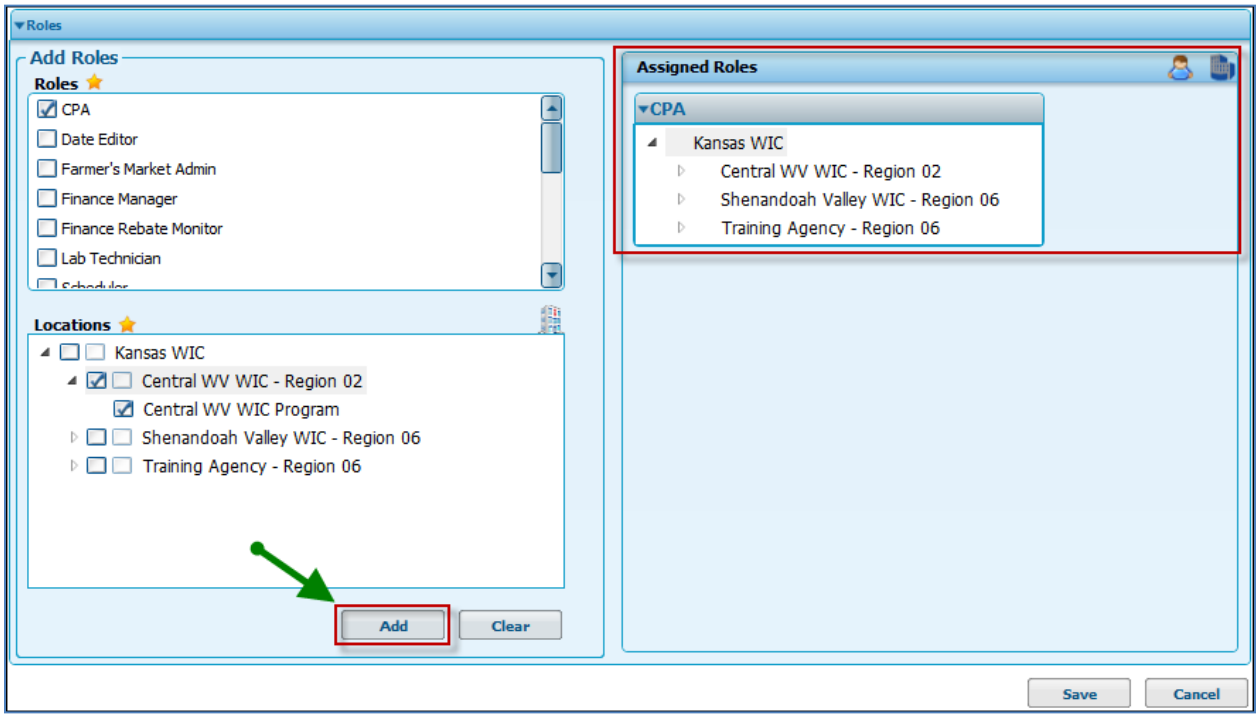
This icon displays after the regions have been expanded by clicking the expand/collapse arrows.


Locations
Kansas WIC
Central WV WIC - Region 02
Central WV WIC Program
Shenandoah Valley WIC - Region 06
Training Agency - Region 06

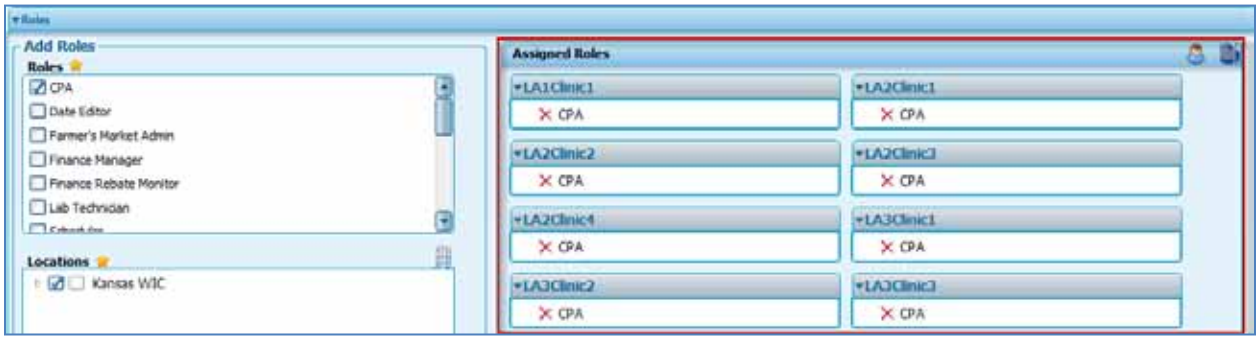
The level at which roles can be assigned depends on the permissions of the logged on user. If the user is signed in at the State level, all State locations will be displayed. If the user is signed in at the agency level, State level assignment is not available. If the user is signed in at the clinic level, only individual clinic assignments are available.

8. Click **Add**. The locations to which the selected roles have been assigned will be added to the Assigned Roles section.

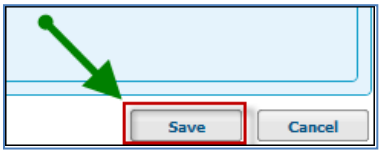
   · Click the **Sort by Roles** icon to sort the assignments by role.



- Click the **Sort by Location** icon to sort the assignments by location.



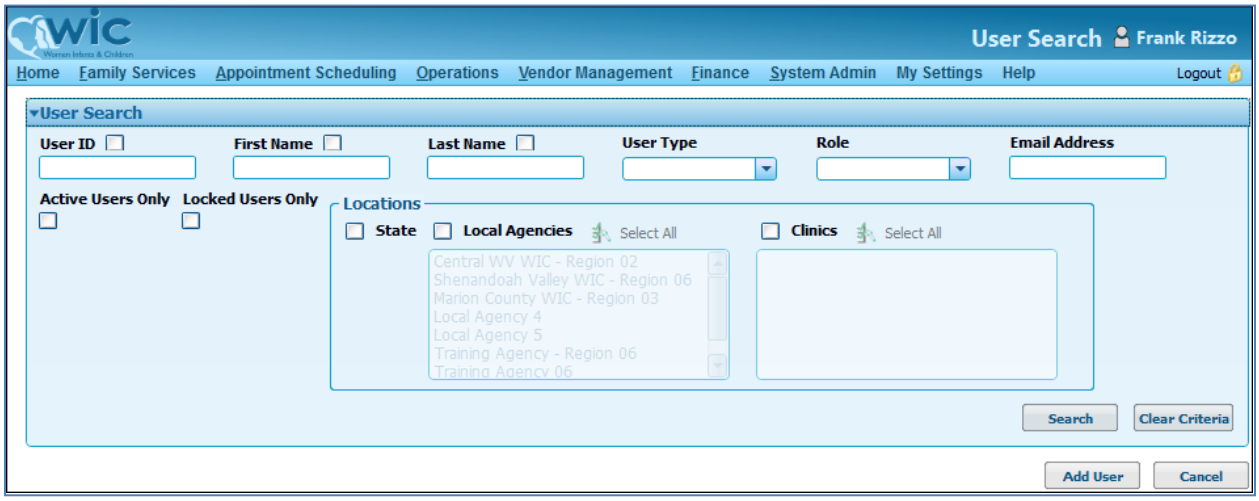

9. Click **Save**. A status message displays.

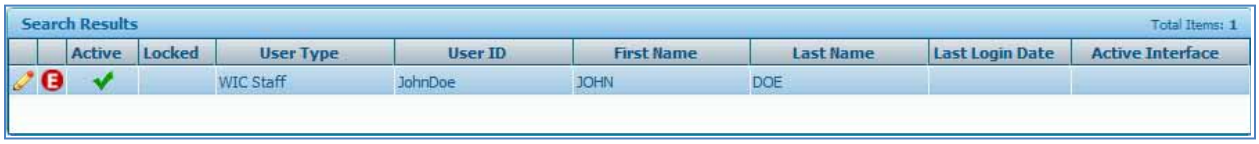


## Task E. Modifying an Existing External Participant User Account

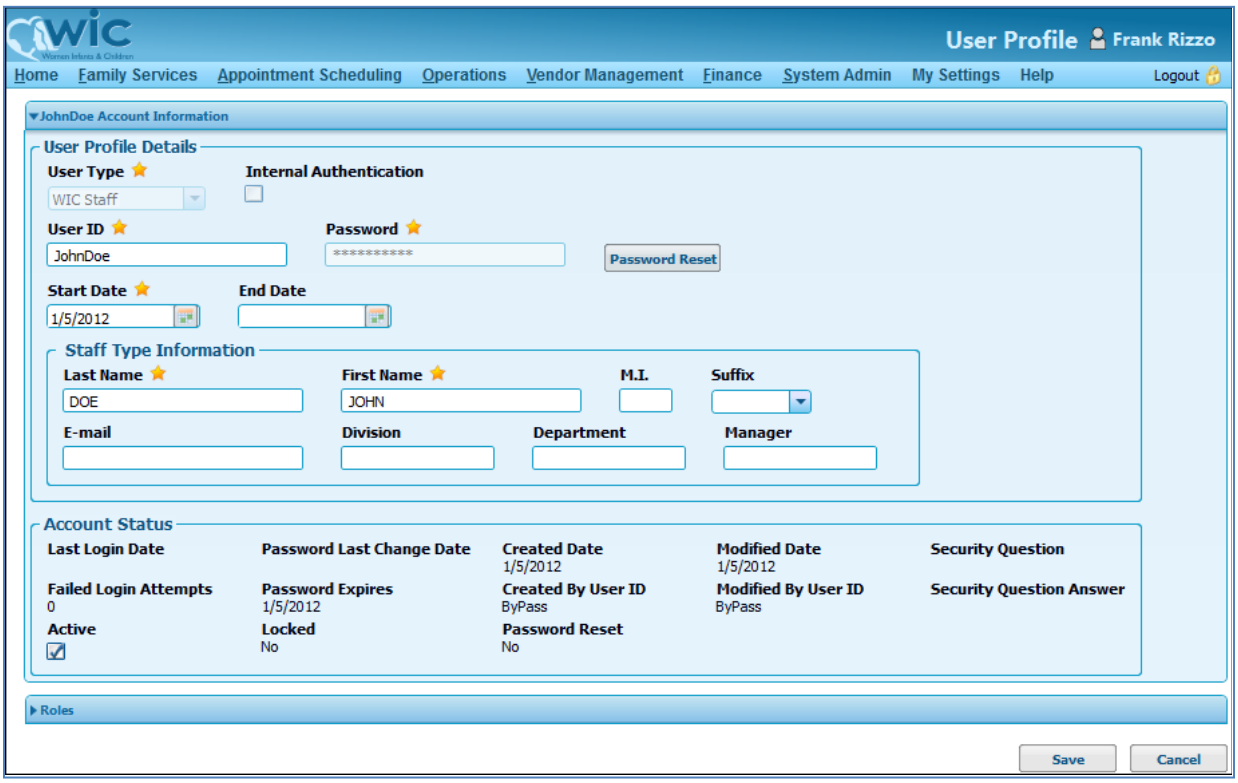
Complete the following steps to perform this task:

1. Search for an External Participant User Account on the User Search page. (For details, refer to Task A of the current scenario.)



2. Double-click on a row in the grid or click the pencil icon to modify the user record. The User Profile screen displays.




3. For External Participant users, update the User Profile Details section for the existing user account by modifying the following as needed:

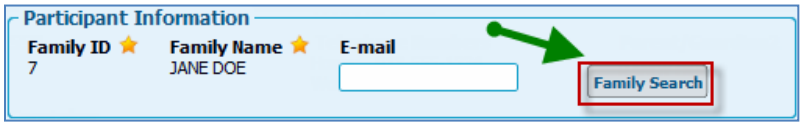
   - Edit the **User ID**.
   - Click **Password Reset** to automatically generate a random password.

Randomly generated passwords comply with the Password Complexity Rule settings established in the Security Configuration screen. When the user logs into the Crossroads WIC System for the first time, he or she will be prompted to create a new password.

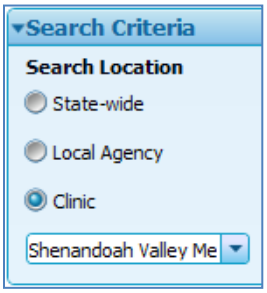
If your State uses NCID or Active Directory, Passwords may be maintained using an external system.

- Edit the **Start Date**. This is the first day on which the User ID is valid.
- Edit the **End Date**. This is the last day on which the User ID is valid.

4. Click **Family Search** to change the assigned external participant Family ID and Family Name. The Family Search screen displays.

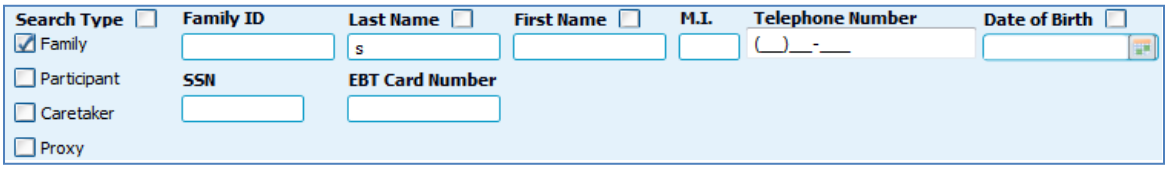


5. Under Search Criteria, select the desired **Search Location**.



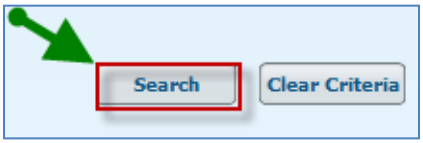

Search Location can be refined by using the set of radio buttons and the associated drop-down list.

6. Under Search Type, enter or select the desired search criteria.




Check the Last Name, First Name, or Date of Birth box to conduct an exact match search on the value entered.

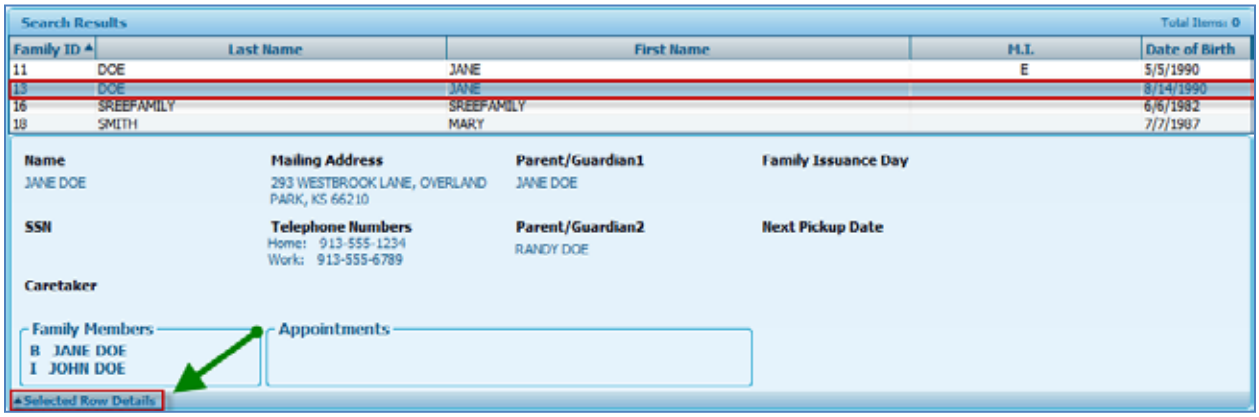
7. Click **Search.** The screen is refreshed and displays the results in the Search Results grid.



Click a column header to sort the results of the search (example below).

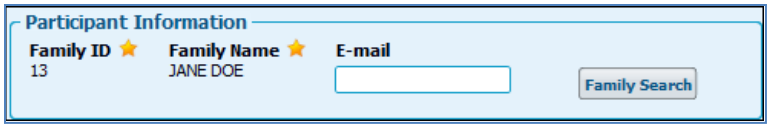
Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid (not shown).

Select a row in the grid and click Selected Row Details to view detailed information about the selected record.

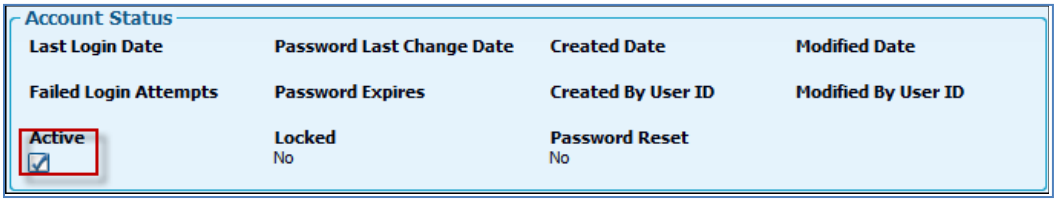



8. Double-click on a row in the grid to select the external participant. The User Profile screen displays.

The Participant Information section will be updated with the selected **Family ID** and **Family Name**.

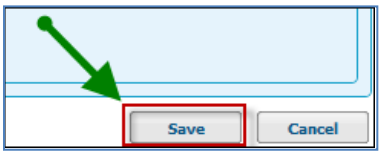



9. Enter the user's **E-mail** address, if needed.
10. Uncheck **Active** in the Account Status section if you wish to deactivate the user account.




The user account is **Active** by default. The other items in the Account Status section are provided for informational purposes only and cannot be changed.

11. Click **Save**. A status message displays.




## Congratulations!

You have successfully added new user accounts, searched for existing users, and modified existing user accounts.

# SECURITY

## Adding, Editing, and Deleting Roles

### Overview

The Role Maintenance screen is used to manage user roles. It displays all currently defined roles and can be used to add new roles and/or modify and delete existing roles. A role is a group of permissions at a defined security access level. When user accounts are created, a role must be assigned to the new user. The user will then be granted the permissions defined for the selected role.

This process includes the following tasks:

Task A. Viewing and/or Modifying Existing Roles

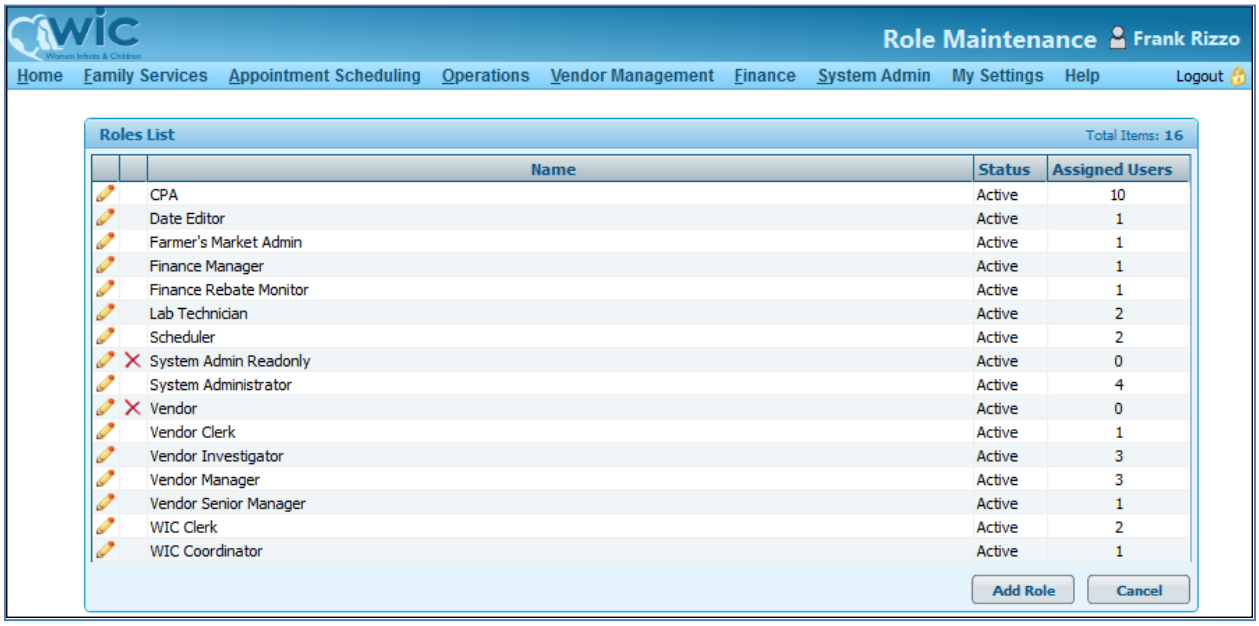
Task B. Adding New Roles

Task C. Deleting Existing Roles

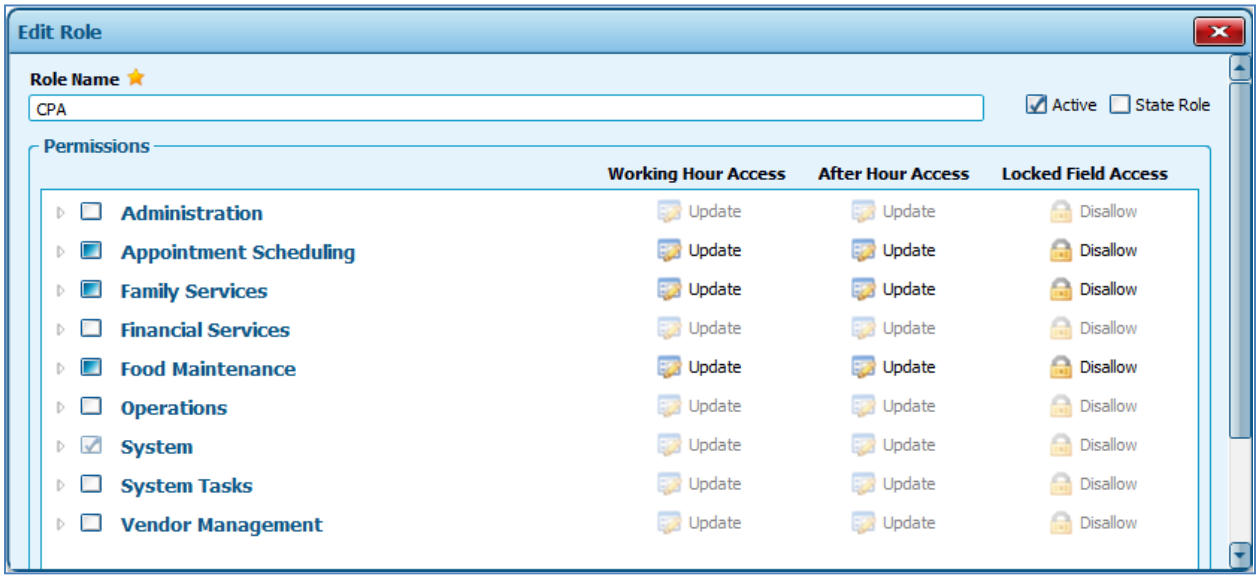
## Task A. Viewing and/or Modifying Existing Roles

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Security à Maintain Roles**. The Role Maintenance screen displays.




2. Double-click a role listed in the Roles List grid, or click the pencil icon to view and edit the permissions defined for the role. The Edit Role screen displays.



3. Edit the **Role Name**, if needed.
4. Check the **Active** box to activate the role, if needed.

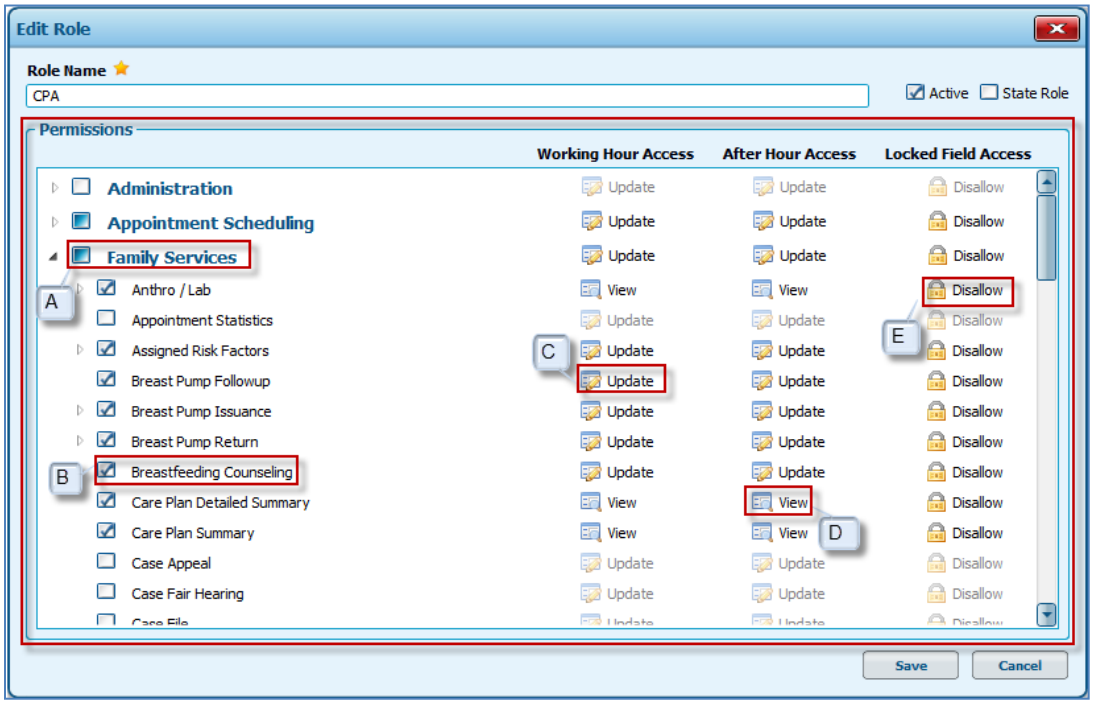
Checking **Active** indicates that the role can be assigned to personnel. Uncheck this box if you'd like to deactivate the role.

5. Check the **State Role** box to indicate that the role is available for assignment to State Personnel only, if needed.
6. Modify the Permissions granted for the role as follows:

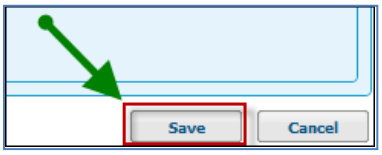
- Click the expand/collapse arrow to display the permissions available for each individual module.
- Check the boxes to grant permissions for a selected module.
- Under Working Hour Access, click the access level icon to indicate whether **Update** Update or **View** View permissions are granted to the role during working hours.
- Under After Hour Access, click the access level icon to indicate whether **Update** Update or **View** View permissions are granted to the role after working hours are over.
- Under Locked Field Access, click the access level icon to indicate whether the role has access to locked fields in the selected module. **Disallow** Disallow or **Allow** Allow permissions are available.

When permissions are granted, two access levels are available: **Update** or **View**. The Update level provides full access to read and save data in the selected module. The View level provides access only to read data in the selected module.

Click the access level icons again to change the designated access level. This allows you to easily toggle between permission settings.



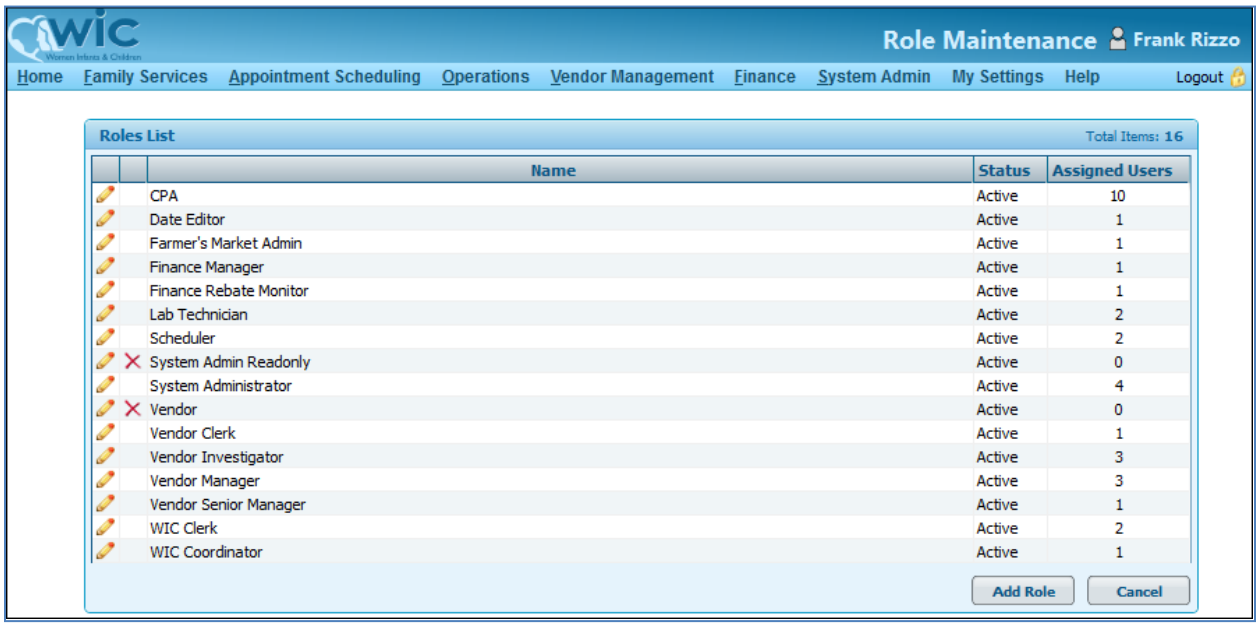
7. Click **Save** to save your changes. A status message displays.



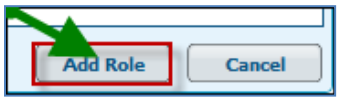
## Task B. Adding New Roles

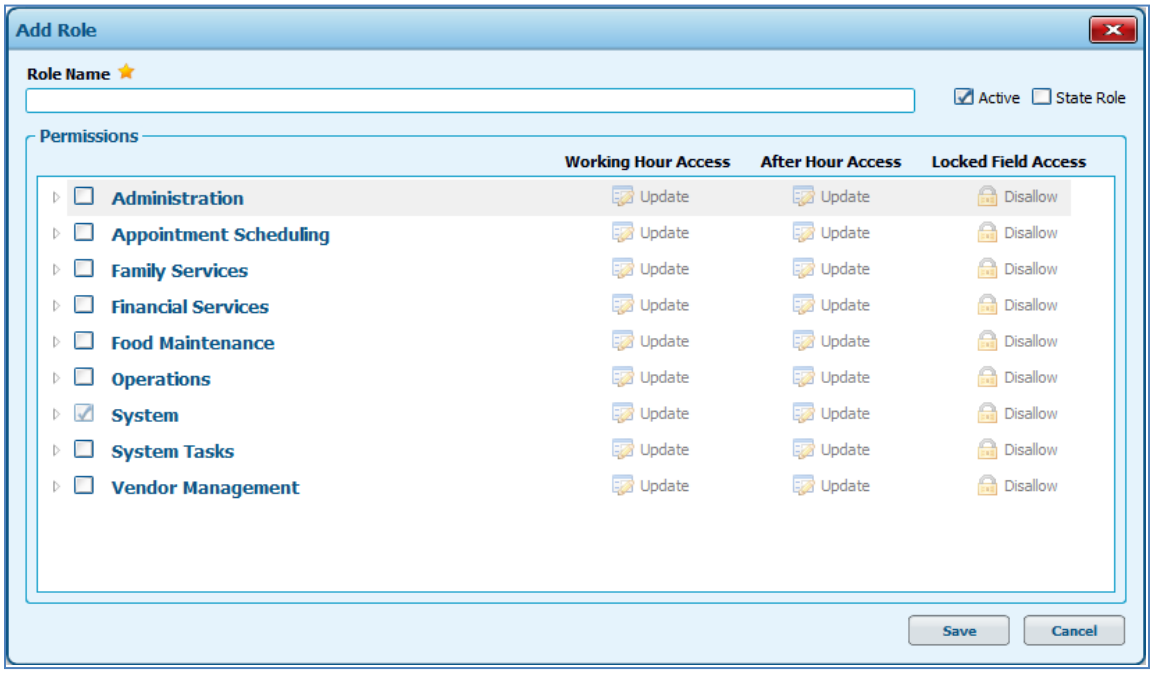
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Security à Maintain Roles**. The Role Maintenance screen displays.




2. Click **Add Role**. The Add Role screen displays.



3. Enter the **Role Name**.

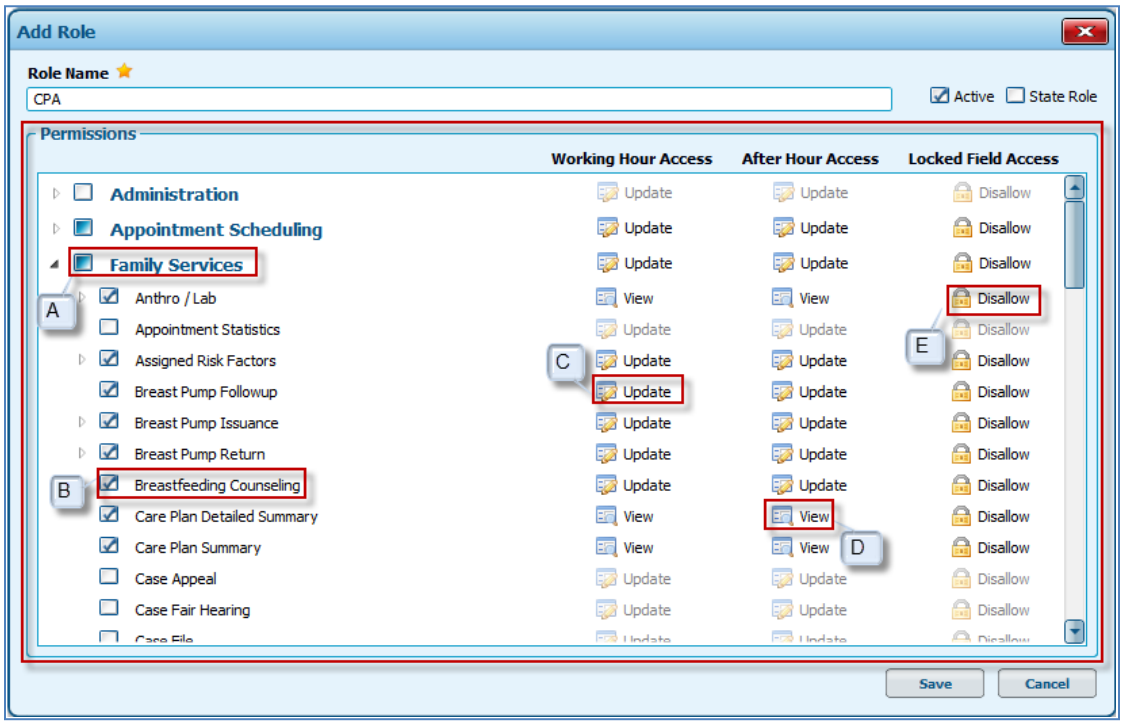
The **Active** box is checked by default. This indicates that the role can be assigned to personnel. Uncheck this box if you'd like to deactivate the role.

4. Check the **State Role** box to indicate that the role is available for assignment to State Personnel only, if needed.
5. Grant Permissions for the role as follows:

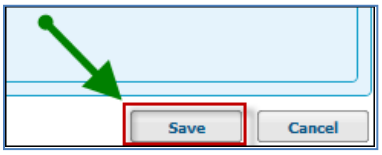
- Click the expand/collapse arrow to display the permissions available for each individual module.
- Check the boxes to grant permissions for a selected module.
- Under Working Hour Access, click the access level icon to indicate whether **Update** Update or **View** View permissions are granted to the role during working hours.
- Under After Hour Access, click the access level icon to indicate whether **Update** Update or **View** View permissions are granted to the role after working hours are over.
- Under Locked Field Access, click the access level icon to indicate whether the role has access to locked fields in the selected module. **Disallow** Disallow or **Allow** Allow permissions are available.

When permissions are granted, two access levels are available: **Update** or **View**. The Update level provides full access to read and save data in the selected module. The View level provides access only to read data in the selected module.

Click the access level icons again to change the designated access level. This allows you to easily toggle between permission settings.



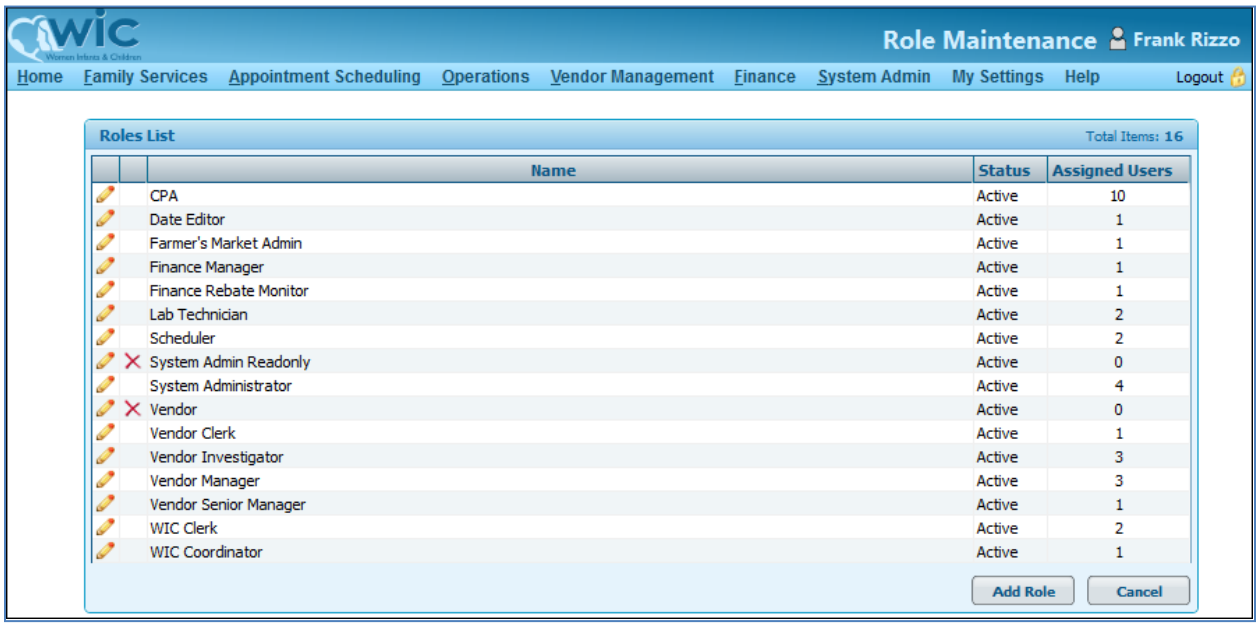
6. Click **Save** to save your changes. A status message displays.



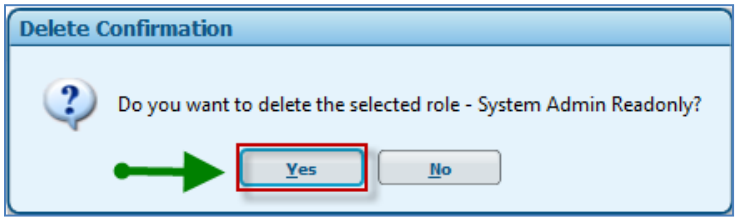
## Task C. Deleting Existing Roles

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Security à Maintain Roles**. The Role Maintenance screen displays.




2. Click the delete icon ✕ to delete an existing user role. A confirmation message displays.




Roles that have been assigned to users cannot be deleted. Modify user roles as necessary to remove role assignment..

3. Click **Yes**. The Roles List will be updated and the selected role will be deleted.

## Congratulations!

You have successfully viewed the list of available roles, modified existing roles, created new roles and granted permissions, and deleted existing roles.

# SECURITY

## Searching, Approving, and Denying Roles

### Overview

The Approve Roles screen allows you to search for role assignments awaiting approval and then approve or deny those assignments. Role assignments initially set up by users with access to this screen will be automatically approved and will not be displayed here. This step is only necessary when a user lacks the necessary approval authority. Furthermore, the Role Approval screen is used only when the "Require Approval For User Role Assignment Process" check box is selected under the Security Settings section of the Configuration Settings screen.

This process includes the following tasks:

Task A. Searching for Pending Role Assignments

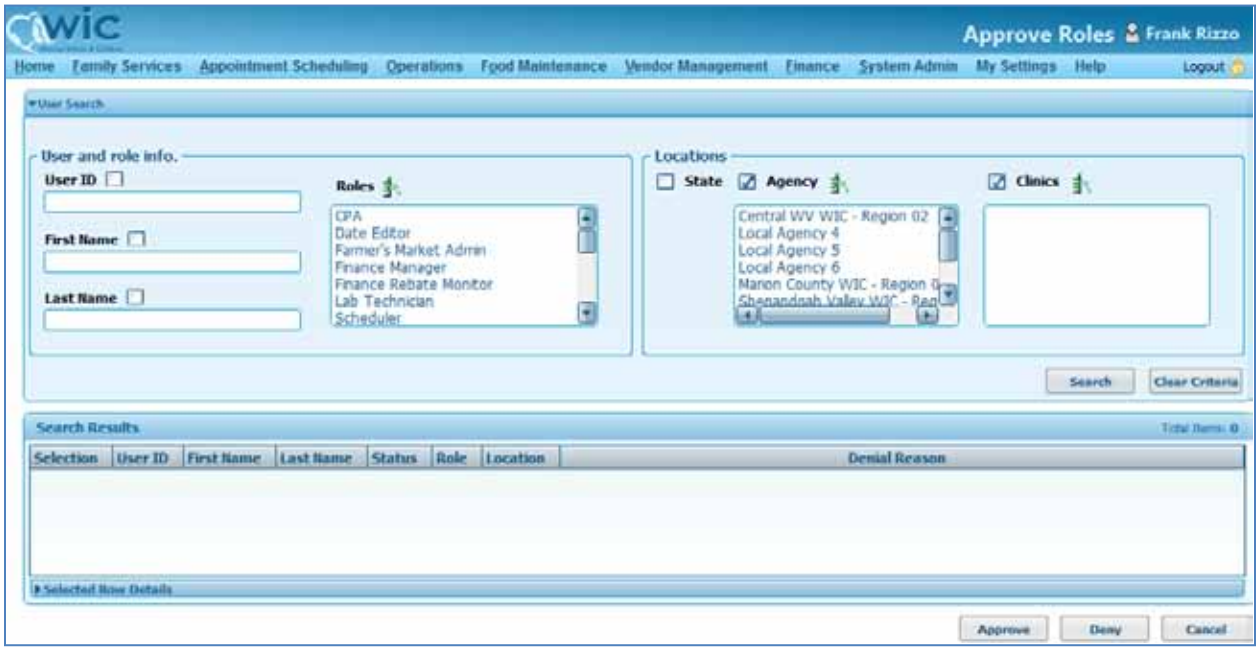
Task B. Approving Role Assignments

Task C. Denying Role Assignments

## Task A. Searching for Pending Role Assignments

Complete the following steps to perform this task:

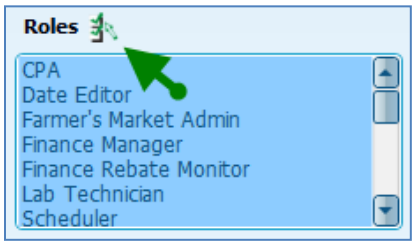
1. From the Home screen, go to **Administration à Security à Approve Roles**. The Approve Roles screen displays.



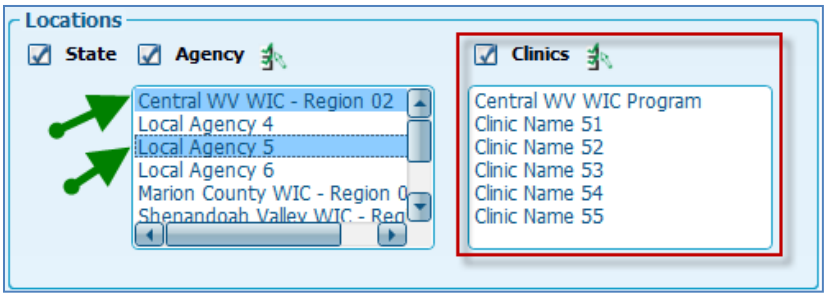

2. Under Search Users, enter or select the desired search criteria.

Check the User ID, First Name, or Last Name box to conduct an exact match search on the value entered. Check the State, Agency or Clinics box to conduct a location search.

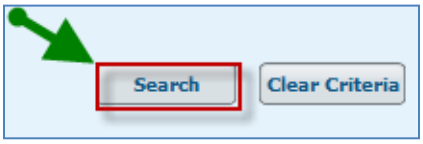
To quickly select all available Roles, Agencies, or Clinics, click the **Select All** icon .

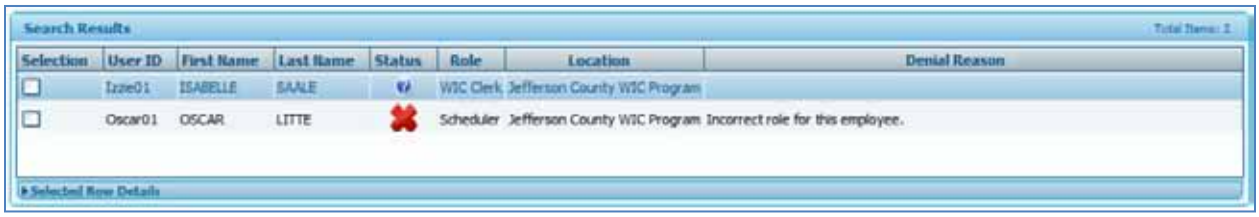


The available Clinics will be displayed only after selecting one or more Agencies.




3. Click **Search.** The screen is refreshed and displays the results in the Search Results grid.




Click a column header to sort the results of the search.

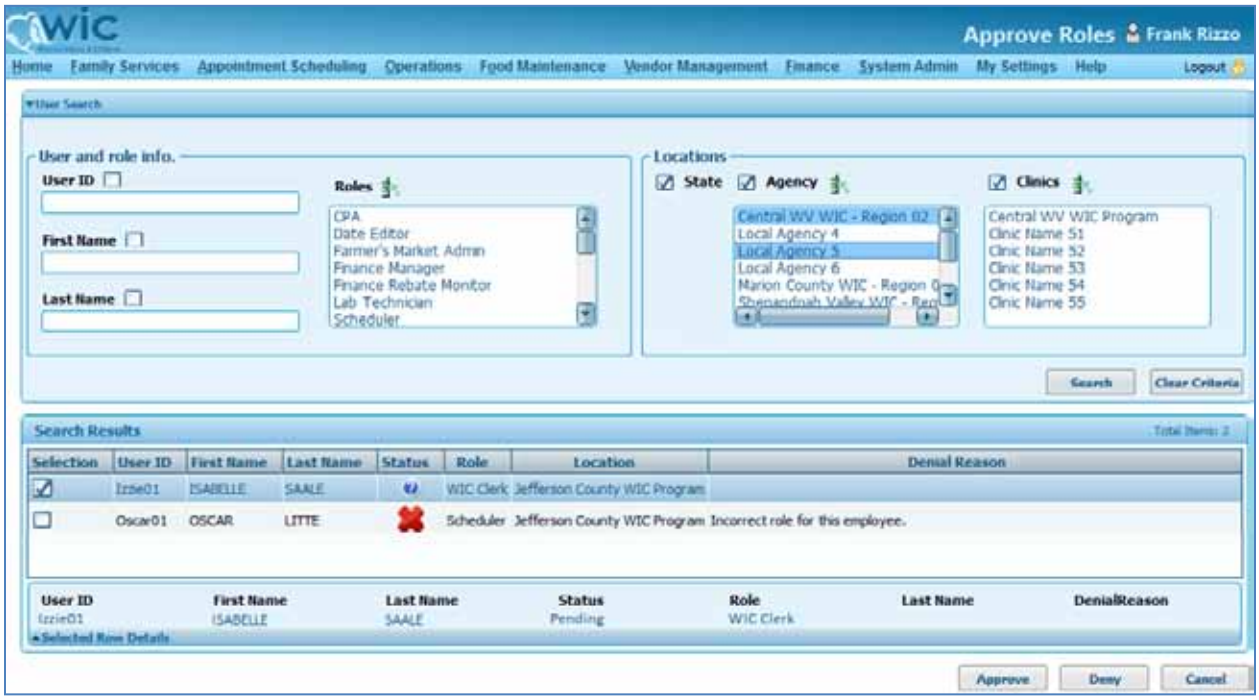
Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

4. Expand the Selected Row Details section by clicking the expand/collapse arrow. Additional details will be displayed.

## Task B. Approving Role Assignments

Complete the following steps to perform this task:

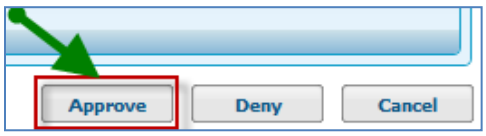
1. On the Approve Roles screen, search for role assignments in need of approval. (For details, review Task A of the current scenario.) The Search Results grid displays pending assignments based on your search criteria.



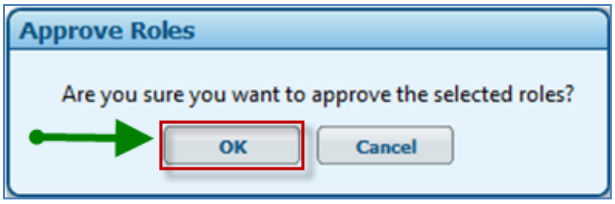
The Status column of the Search Results grid indicates whether each Role Assignment is pending approval or has previously been denied . Role Assignments that have already been approved will not be displayed in the grid.

2. Mark the Selection box to select a pending role assignment.

3. Click **Approve** to approve the selected role assignment. A confirmation message displays.



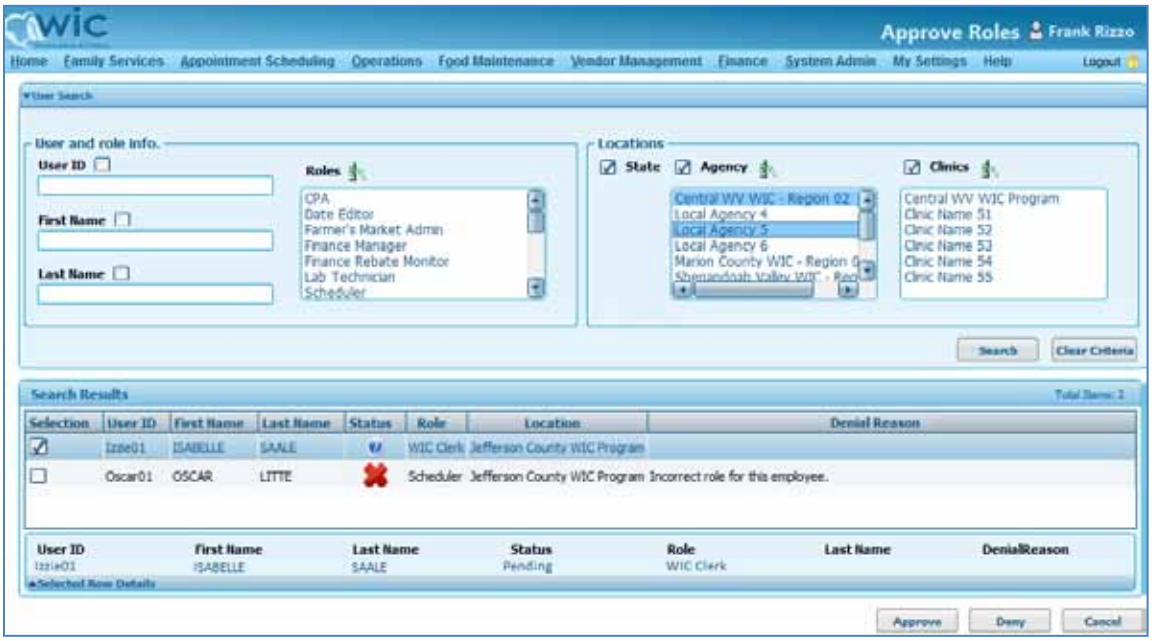
4. Click **OK** to approve the role assignment. The Search Results grid will be refreshed and the approved role will be removed from the list.



## Task C. Denying Role Assignments

Complete the following steps to perform this task:

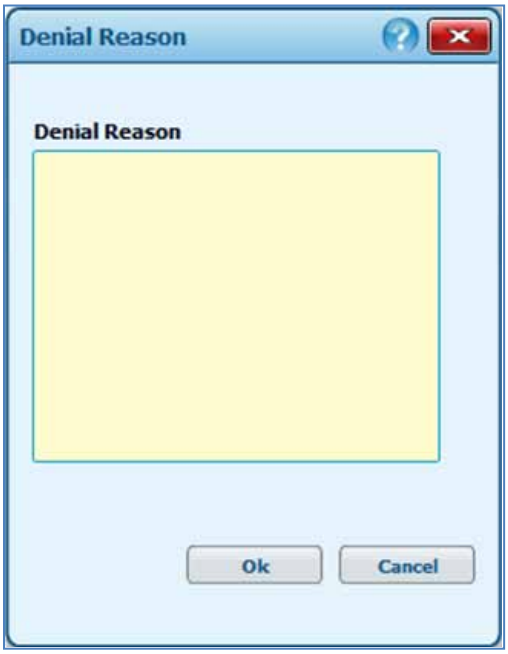
1. On the Approve Roles screen, search for role assignments that should be denied. (For details, review Task A of the current scenario.) The Search Results grid displays pending assignments based on your search criteria.



The Status column of the Search Results grid indicates whether each Role Assignment is pending approval or has previously been denied. Role Assignments that were previously approved will not be displayed in the grid.

2. Mark the Selection box to select a pending role assignment.

3. Click **Deny** to deny the selected role assignment. The Denial Reason screen displays.




4. Enter the **Denial Reason**.
5. Click **OK** to deny the role assignment. The Search Results grid will be refreshed, displaying the denial icon and the Denial Reason.

## Congratulations!

You have successfully searched for pending role assignments, approved pending role assignments, and denied pending role assignments.

# SECURITY

## Managing User Security Configuration

### Overview

The User Security Configuration screen allows you to define and maintain the security configuration settings associated with user logins.

This process includes the following task:

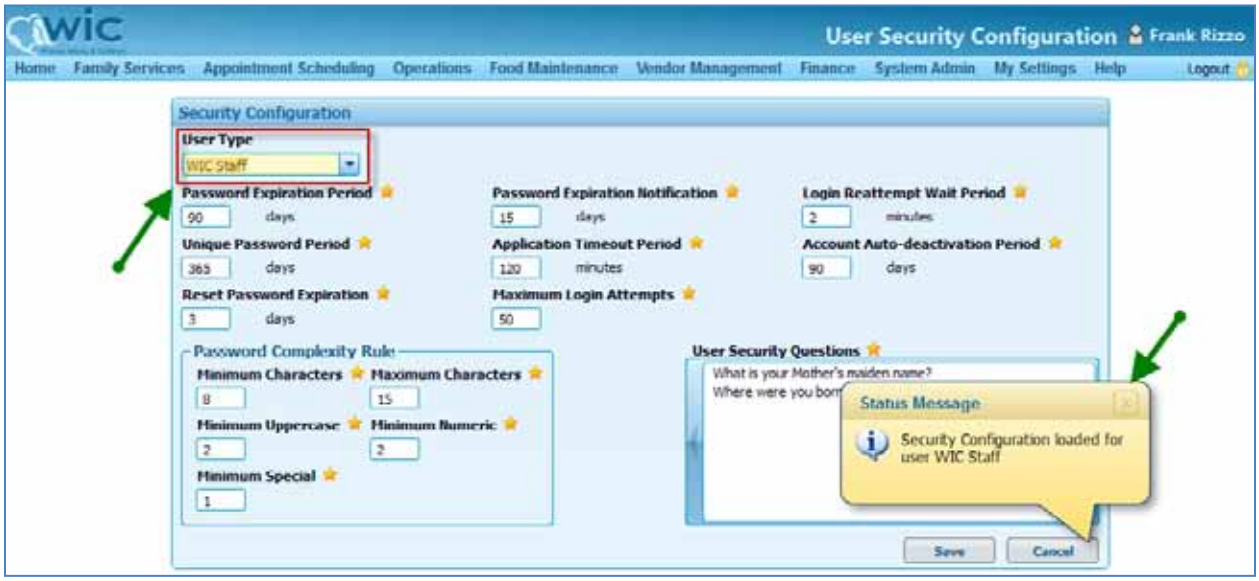
Task A. Managing Security Configuration Settings

## Task A. Managing Security Configuration Settings

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Security à Manage Security Configuration**. The User Security Configuration screen displays.

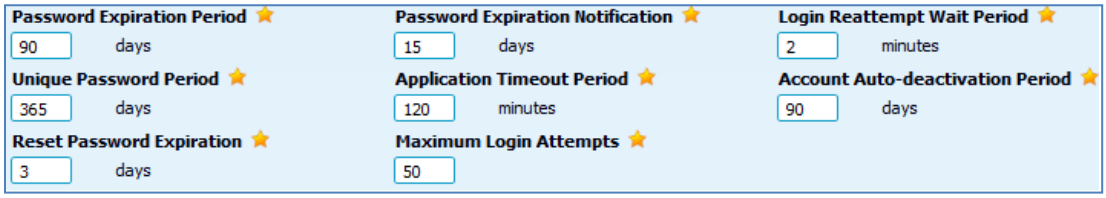
2. Under Security Configuration, select the **User Type**. The screen is refreshed and the configuration settings for the selected user type are loaded. A status message displays.



Three user types are available for configuration: **WIC Staff**, **External Participant**, and **External Vendor**. Changes made to the User Security Configuration screen will affect all users of the selected type.

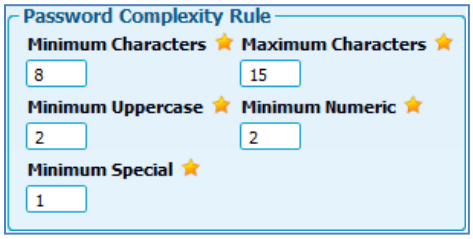
3. Under Security Configuration, manage the configuration settings as follows:

   - Enter the **Password Expiration Period**.
   - Enter the **Password Expiration Notification**.
   - Enter the **Login Reattempt Wait Period**.
   - Enter the **Unique Password Period**.
   - Enter the **Application Timeout Period**.
   - Enter the **Account Auto-deactivation Period**.
   - Enter the **Reset Password Expiration**.
   - Enter the **Maximum Login Attempts**.




4. Under Password Complexity Rule, manage the password complexity settings as follows:

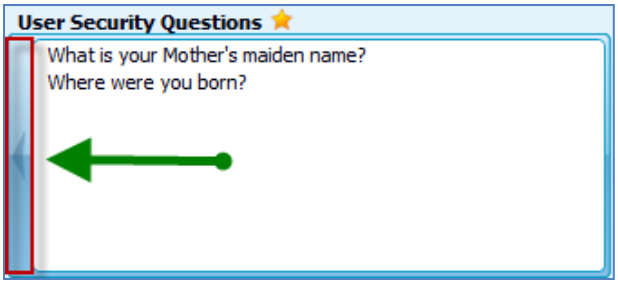
   - Enter the **Minimum Characters**.
   - Enter the **Maximum Characters**.
   - Enter the **Minimum Uppercase** characters.
   - Enter the **Minimum Numeric** characters.
   - Enter the **Minimum Special** characters.

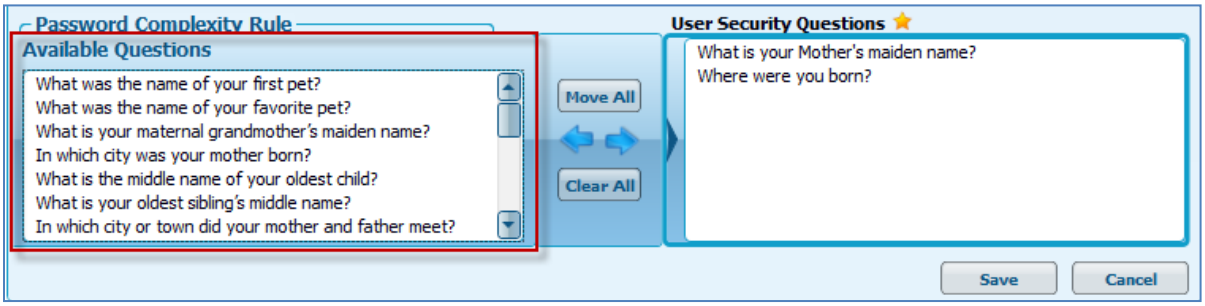


These settings govern the strength requirements for users' passwords. When a user account is created, an initial password is randomly generated (consistent with these settings). When users later change their passwords, they must comply with these settings.

If your State uses NCID or Active Directory, Passwords may be maintained using an external system.

5. Click the expand arrow to manage User Security Questions. The Available Questions list will be displayed.

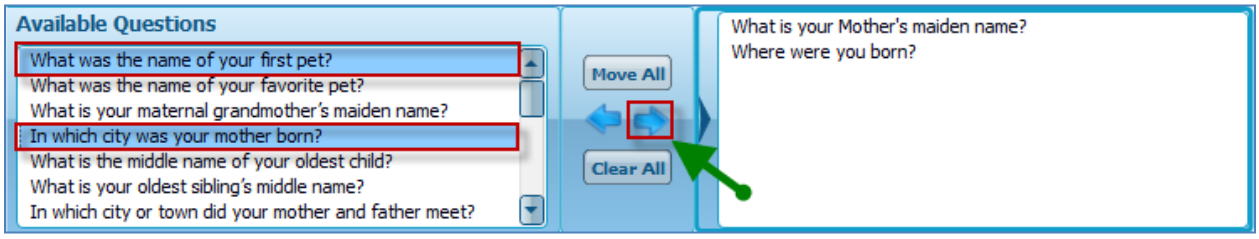




Password Complexity Rule
Available Questions
What was the name of your first pet?
What was the name of your favorite pet?
What is your maternal grandmother's maiden name?
In which city was your mother born?
What is the middle name of your oldest child?
What is your oldest sibling's middle name?
In which city or town did your mother and father meet?
Move All
Clear All
User Security Questions
What is your Mother's maiden name?
Where were you born?
Save
Cancel

6. Click to select one or more questions from the **Available Questions** list.

The User Security Questions will be used for validation if users forget their passwords and need them to be reset.

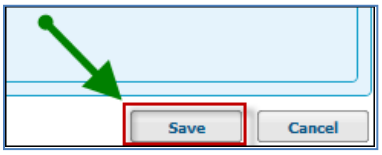
7. Click the right arrow to add your selections to the **User Security Questions** list.


Available Questions
What was the name of your first pet?
What was the name of your favorite pet?
What is your maternal grandmother's maiden name?
In which city was your mother born?
What is the middle name of your oldest child?
What is your oldest sibling's middle name?
In which city or town did your mother and father meet?
Move All
Clear All
What is your Mother's maiden name?
Where were you born?

To add all Available Questions to the User Security Questions list, click **Move All**. To remove all questions from the User Security Questions list, click **Clear All**.

Move individual questions from one list to the other by highlighting questions and then clicking the right arrow or left arrow .

8. Click **Save**. A status message displays.




## Congratulations!

You have successfully managed user security configuration settings, password complexity rules, and user security questions.

# DASHBOARD

## Working with Dashboards

### Overview

The Edit Dashboard, Edit Finance Dashboard, and Edit Vendor Dashboard screens are used to manage dashboard settings. The main Dashboard is the Home screen for the Crossroads WIC application. The Finance Dashboard is displayed when the Finance menu is selected. The Vendor Dashboard is displayed when the Vendor menu is selected.

While the Edit Dashboard, Edit Finance Dashboard, and Edit Vendor Dashboard screens control the display options for three separate dashboards, the functions found on these three screens are the same. Each dashboard contains multiple dashboard groups, some of which are editable and some of which are static. The editable dashboard groups allow you to add new dashboard items referencing external websites, or edit and delete dashboard items referencing functions in the Crossroads WIC application. New dashboard groups referencing functions in the Crossroads WIC application can only be added during new releases of the software. The static dashboard groups cannot be changed.

This process includes the following tasks:

Task A. Accessing the Edit Dashboard Screens

Task B. Modifying Dashboard Groups on the Dashboard

Task C. Adding New Groups to the Dashboard

Task D. Deleting Dashboard Groups from the Dashboard

Task E. Modifying Dashboard Links for a Dashboard Group

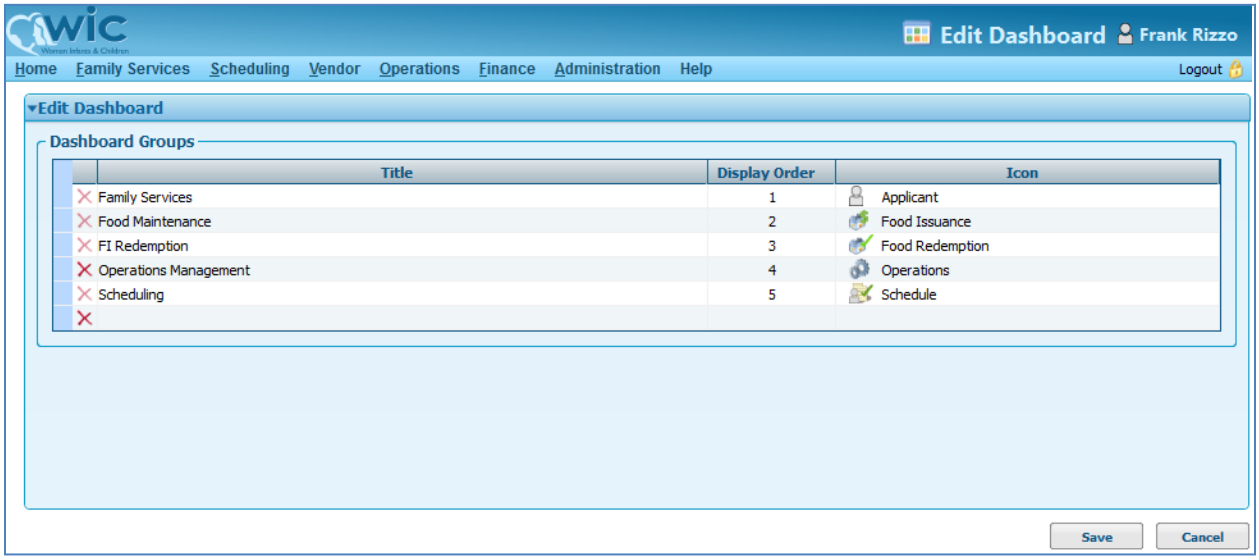
Task F. Adding New Links to a Dashboard Group

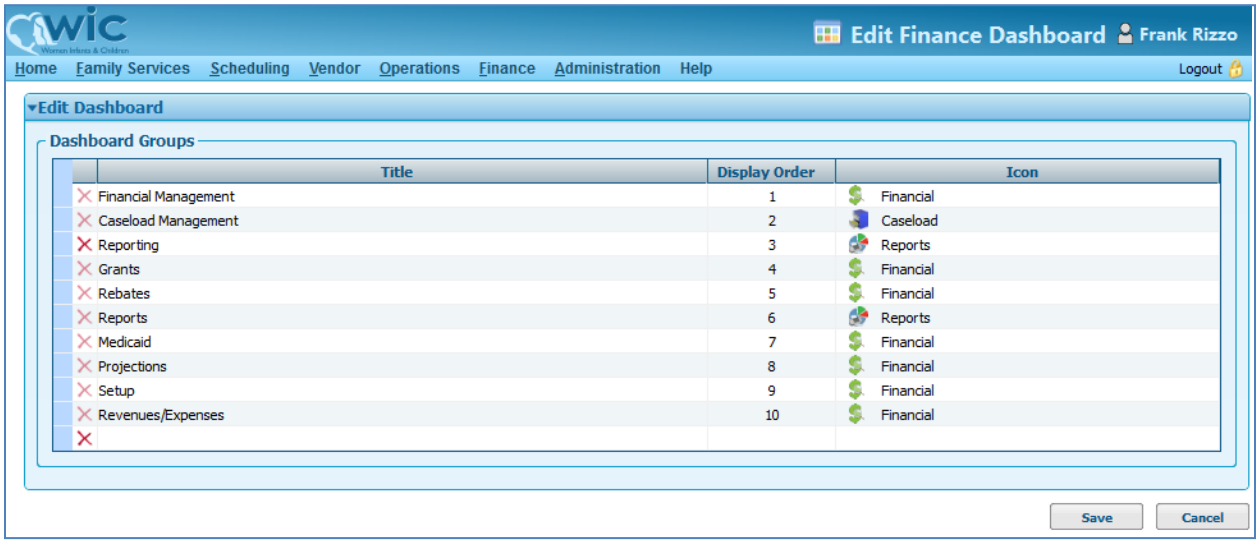
Task G. Deleting Links from a Dashboard Group

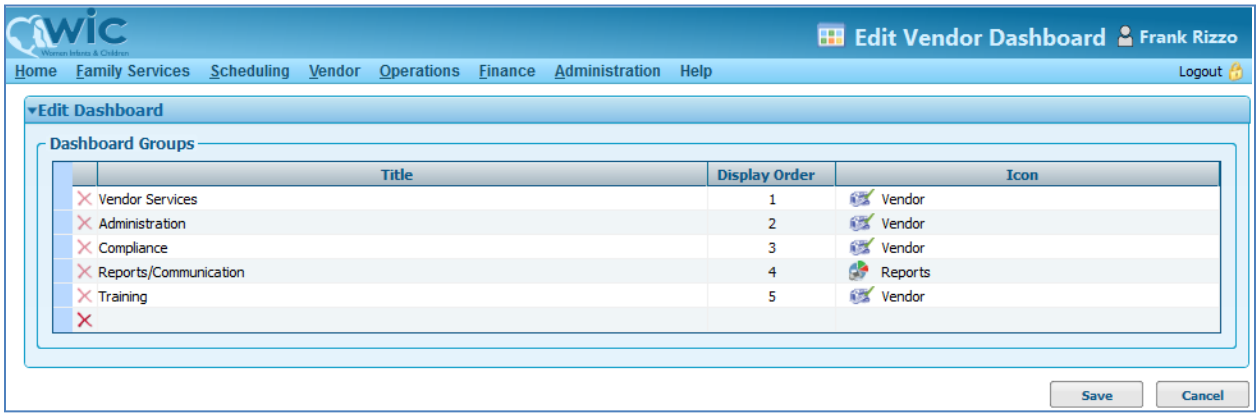
## Task A. Accessing the Edit Dashboard Screens

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Dashboard**. Then select **Edit Main Dashboard**, **Edit Finance Dashboard**, or **Edit Vendor Dashboard**. The Edit Dashboard, Edit Finance Dashboard, or Edit Vendor Dashboard screen displays.



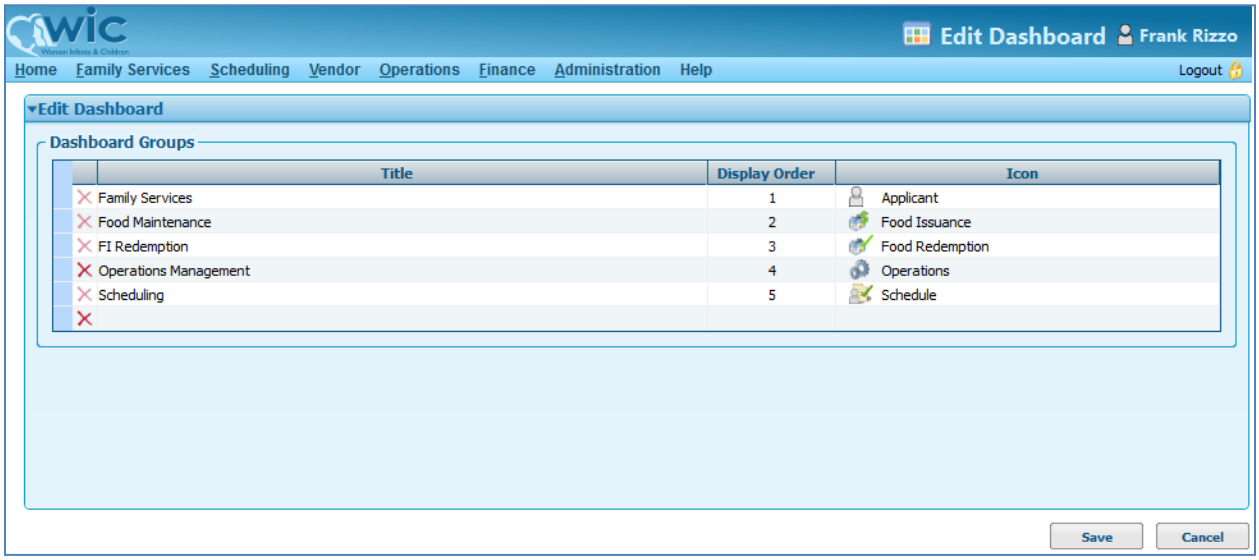




WIC
Edit Vendor Dashboard
Frank Rizzo
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
Edit Dashboard
Dashboard Groups
Title
Display Order
Icon
Vendor Services
1
Vendor
Administration
2
Vendor
Compliance
3
Vendor
Reports/Communication
4
Reports
Training
5
Vendor
Save
Cancel

## Task B. Modifying Dashboard Groups on the Dashboard

Complete the following steps to perform this task:

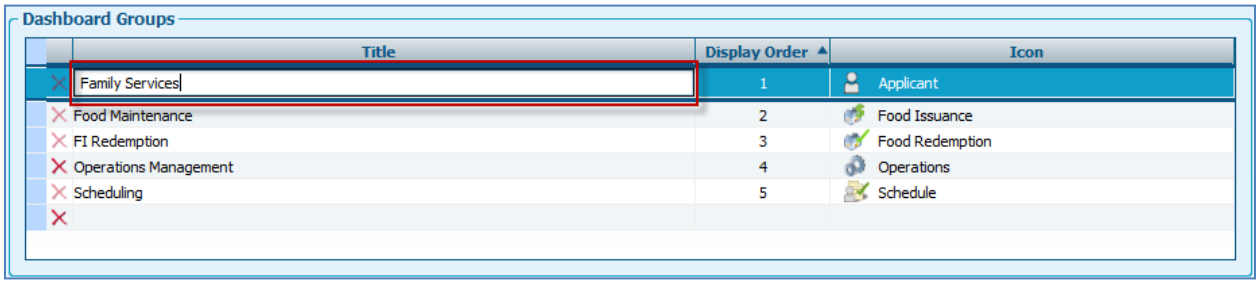
1. Access one of the Edit Dashboard screens. (For details, refer to Task A of the current scenario.)



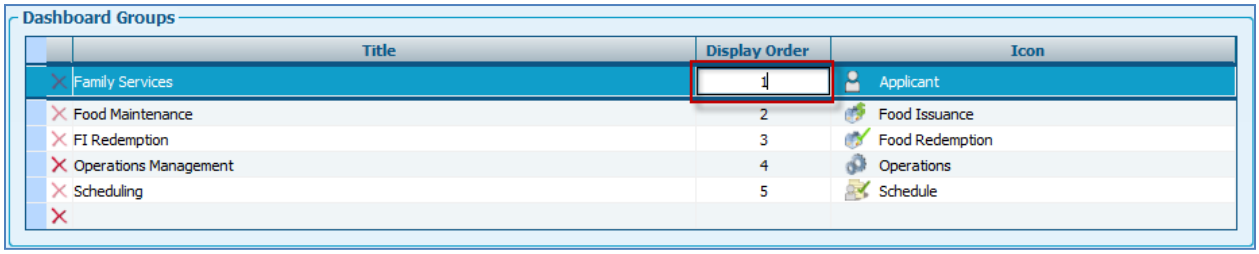
The Dashboard Groups grid displays the Title, Display Order, and Icon for each group defined for the Dashboard screen.

Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

2. Under Dashboard Groups, click the **Title** and type alternate text to edit the name of a Dashboard Group.



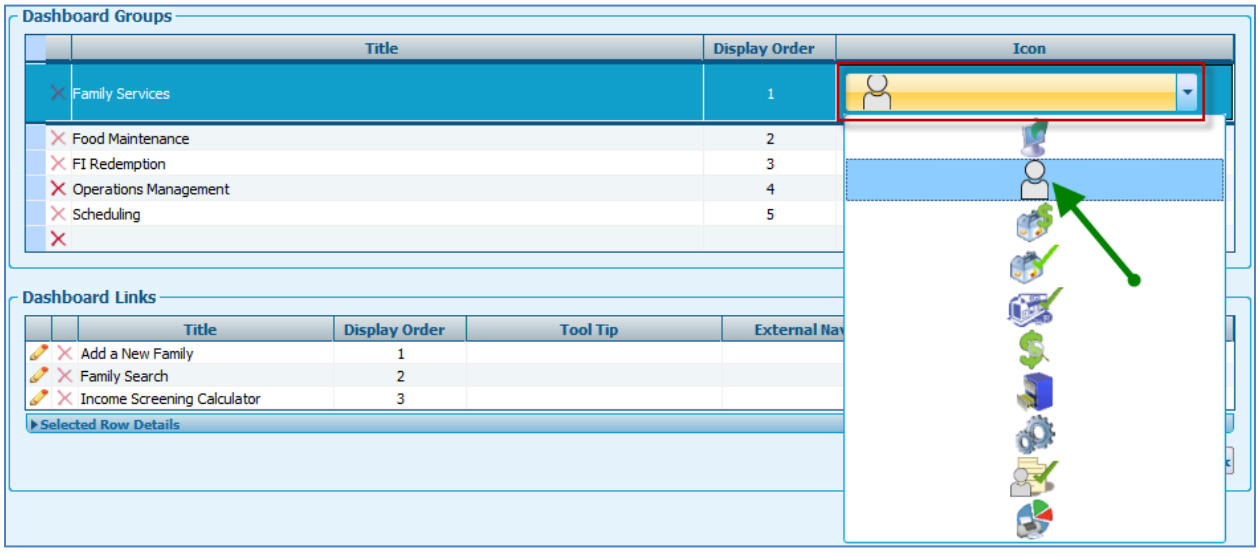
3. Click the **Display Order** and type an alternate number to edit the display order of a Dashboard Group.



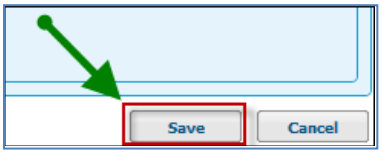

When a change is made to the Display Order for a Dashboard Group, the other Dashboard Groups defined for the Dashboard will be reordered to accommodate the change.

For example, if the Family Services group initially has a Display Order of 1 and the Food Maintenance group initially has a Display Order of 2, when the Display Order for the Food Maintenance group is changed to 1, the Family Services group Display Order will be automatically changed to 2.

4. Click the **Icon** and select an alternate icon to edit the icon for a Dashboard Group.



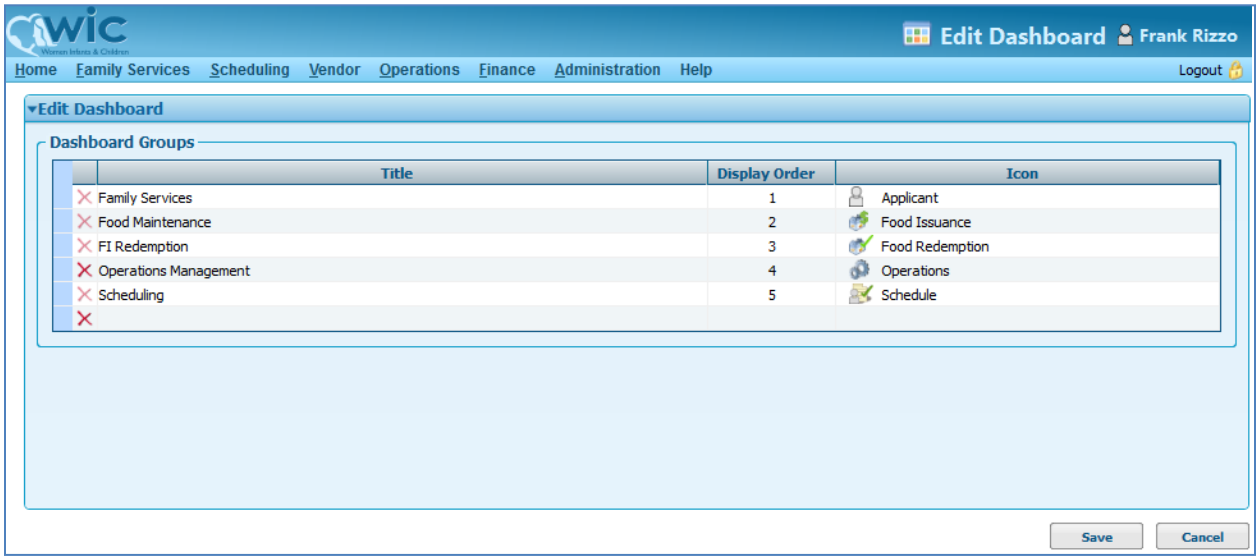

5. Click **Save**. A status message displays.



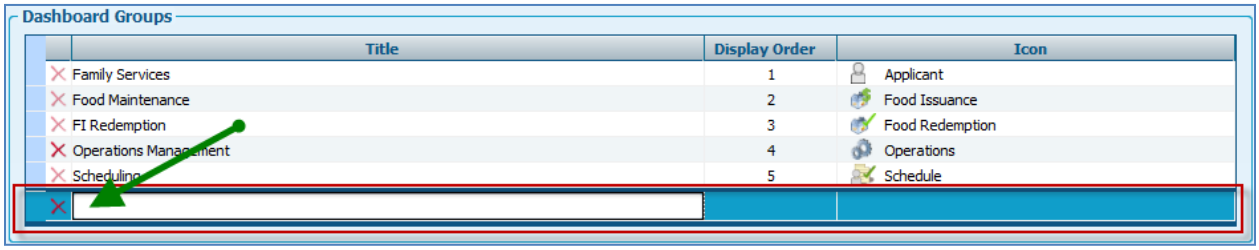
## Task C. Adding New Groups to the Dashboard

Complete the following steps to perform this task:

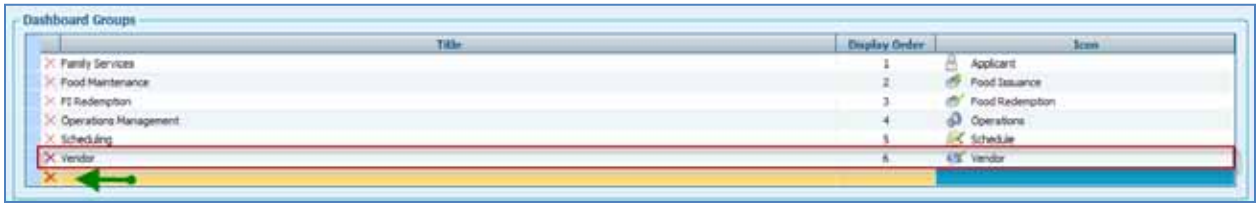
1. Access one of the Edit Dashboard screens. (For details, refer to Task A of the current scenario.)




2. Under Dashboard Groups, click the blank row at the bottom of the grid to select it.

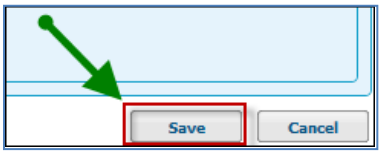



3. Enter the new group's details as follows:
   - Enter the **Title**.
   - Enter the **Display Order**.
   - Select the **Icon**.



When all three items are entered for the new group, a new blank line for additional groups is added at the bottom of the Dashboard Groups grid.

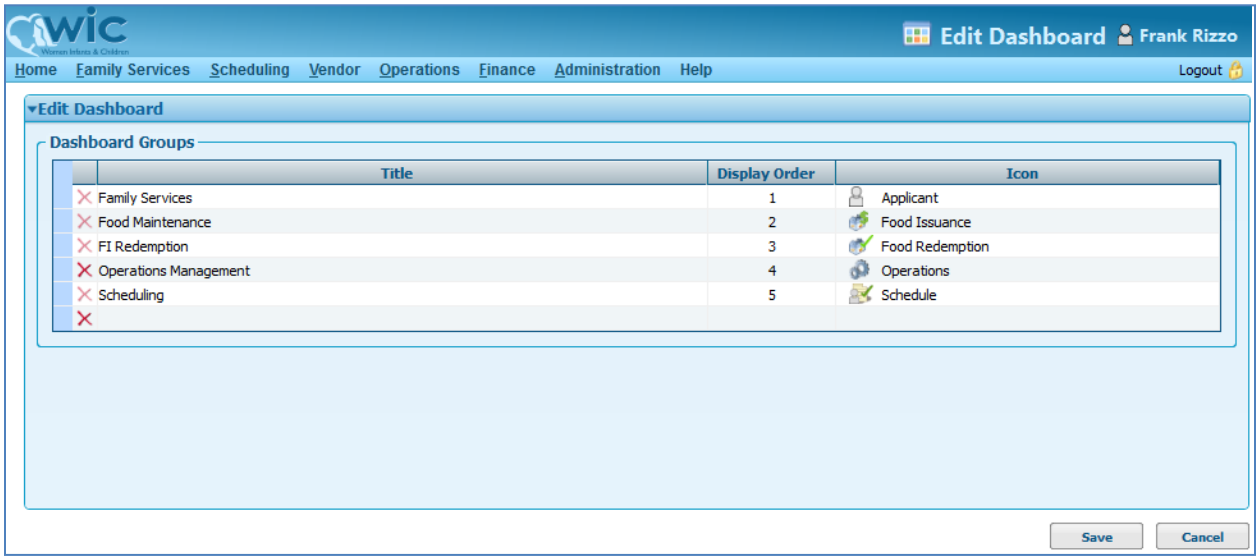
4. Click **Save**. A status message displays.



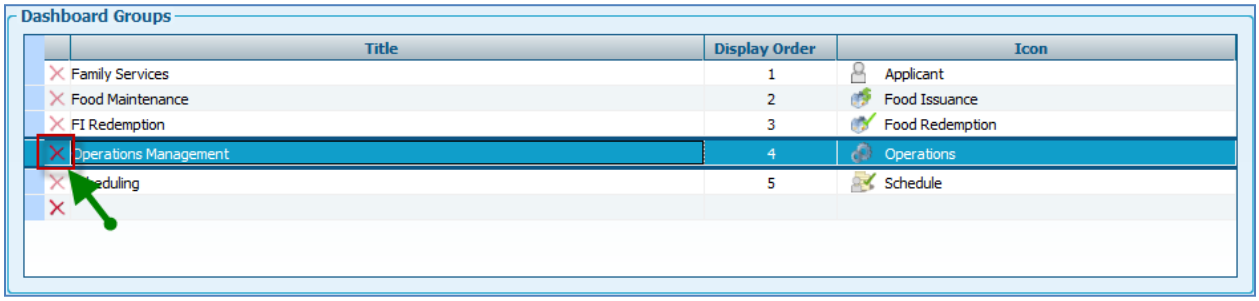
## Task D. Deleting Dashboard Groups from the Dashboard

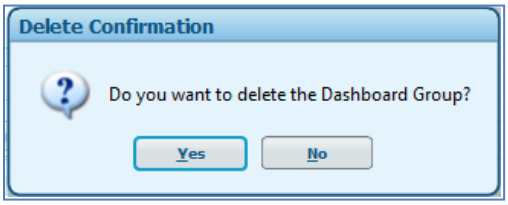
Complete the following steps to perform this task:

1. Access one of the Edit Dashboard screens. (For details, refer to Task A of the current scenario.)

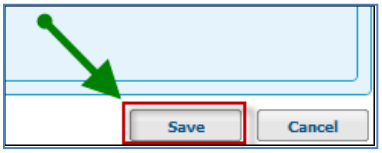



2. Under Dashboard Groups, click a row to select it. Then click the delete icon ✕. The Delete Confirmation screen displays.



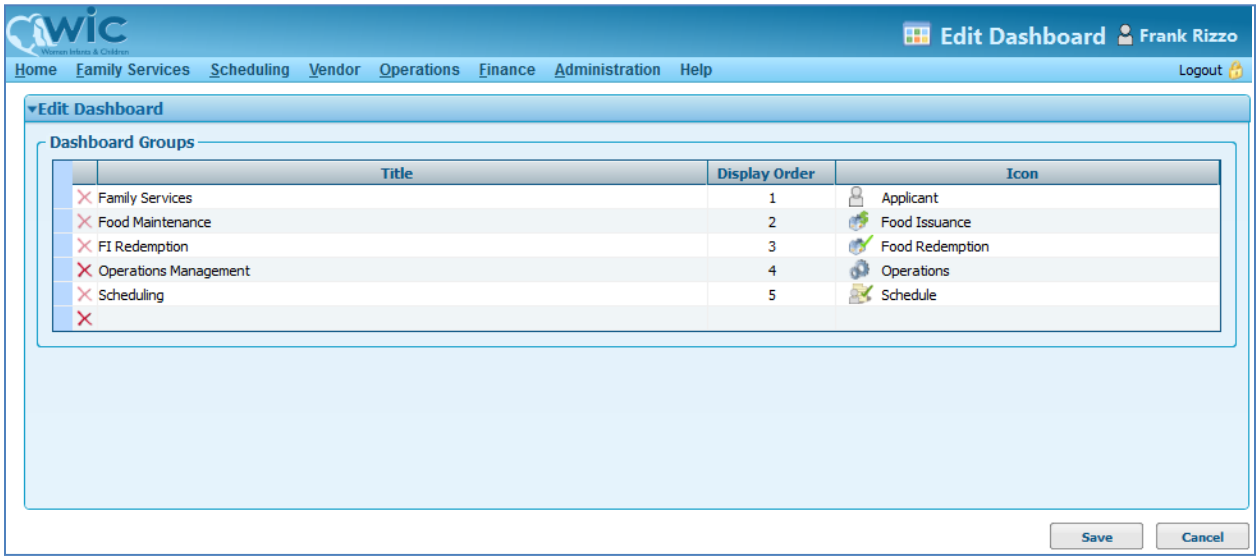

3. Click **Yes**. The screen is refreshed and the deleted group is removed from the Dashboard Groups grid.
4. Click **Save**. A status message displays.



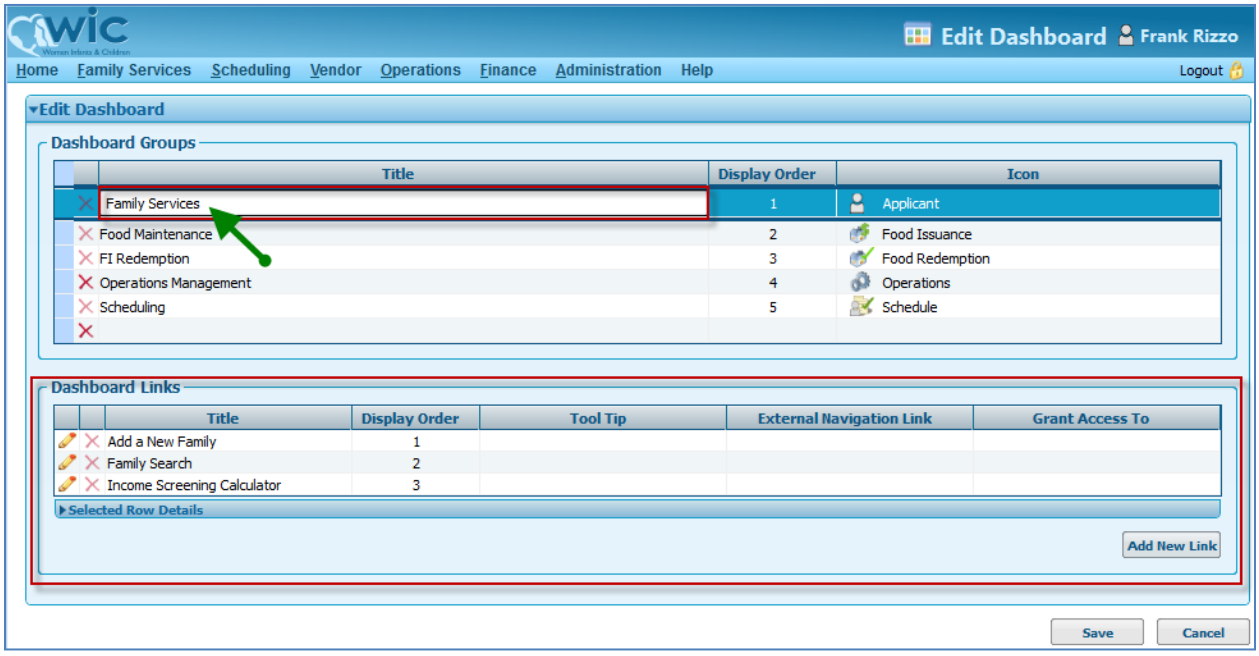
## Task E. Modifying Dashboard Links for a Dashboard Group

Complete the following steps to perform this task:

1. Access one of the Edit Dashboard screens. (For details, refer to Task A of the current scenario.)

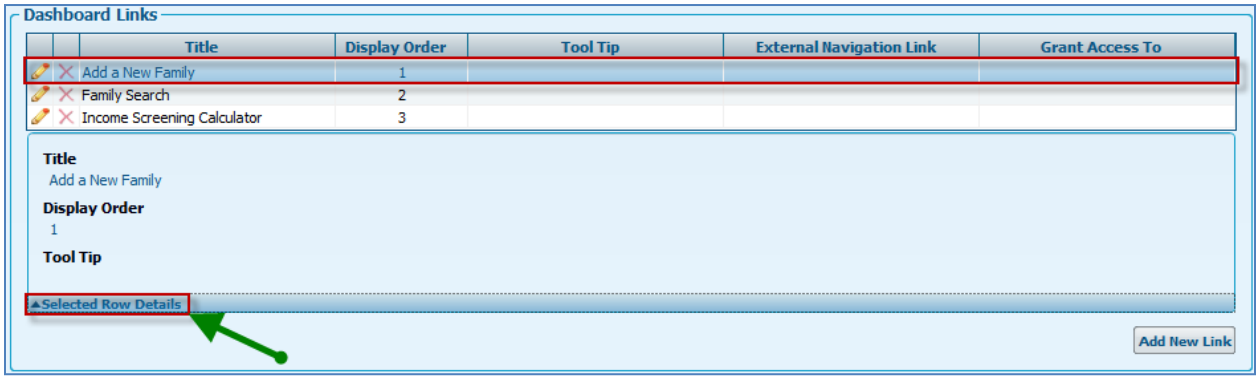



2. Under Dashboard Groups, click a row to select it. The Dashboard Links grid displays.

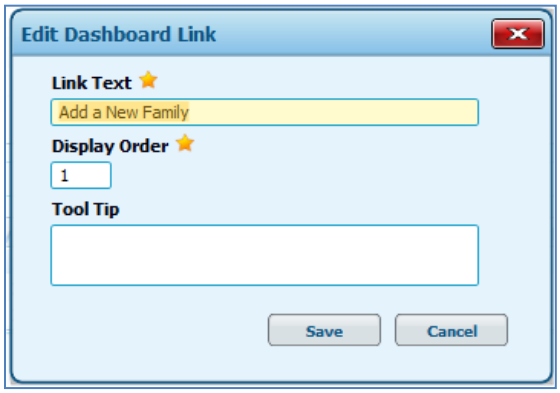


The Dashboard Links grid displays the Title, Display Order, Tool Tip, External Navigation Link, and access information for each link defined for the selected Dashboard Group.

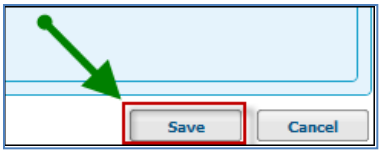
3. Under Dashboard Links, click a row to select it. Then click the expand arrow to view the Selected Row Details. The screen is refreshed and additional details are displayed.



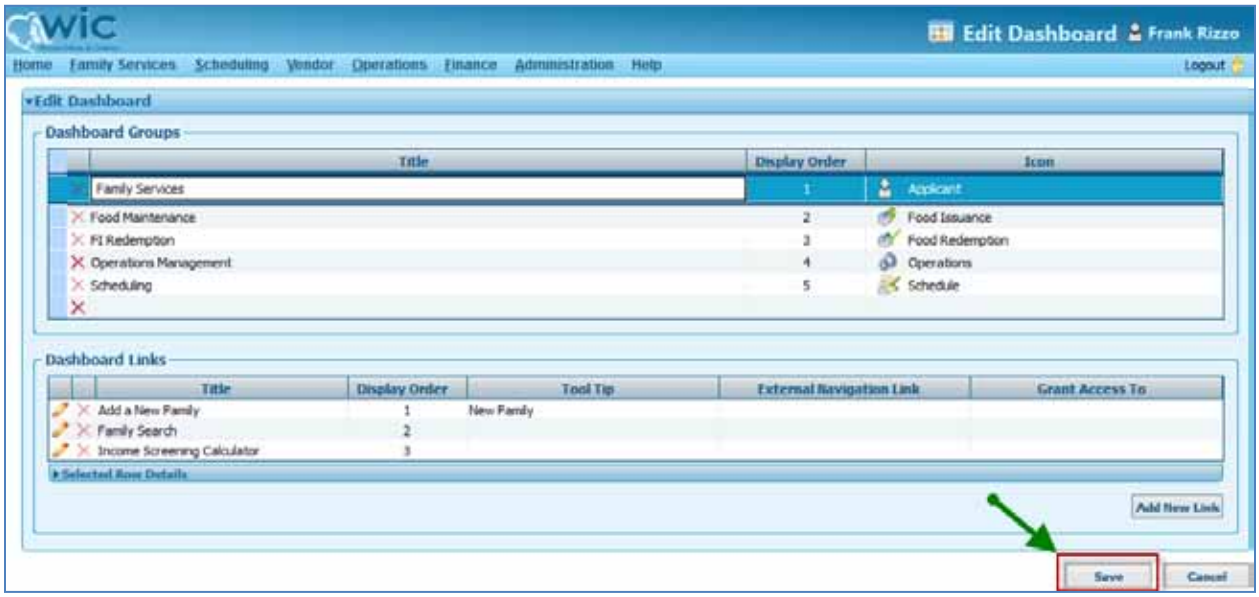

4. Click the pencil icon to edit a dashboard link. The Edit Dashboard Link screen displays.




5. Edit the dashboard link as follows:
   - Edit the **Link Text**, as needed.
   - Edit the **Display Order**, as needed.
   - Enter or edit the **Tool Tip**, as needed.
6. Click **Save**. The Edit Dashboard screen is refreshed and your changes are displayed in the Dashboard Links grid.



7. Click **Save** again on the Edit Dashboard screen.

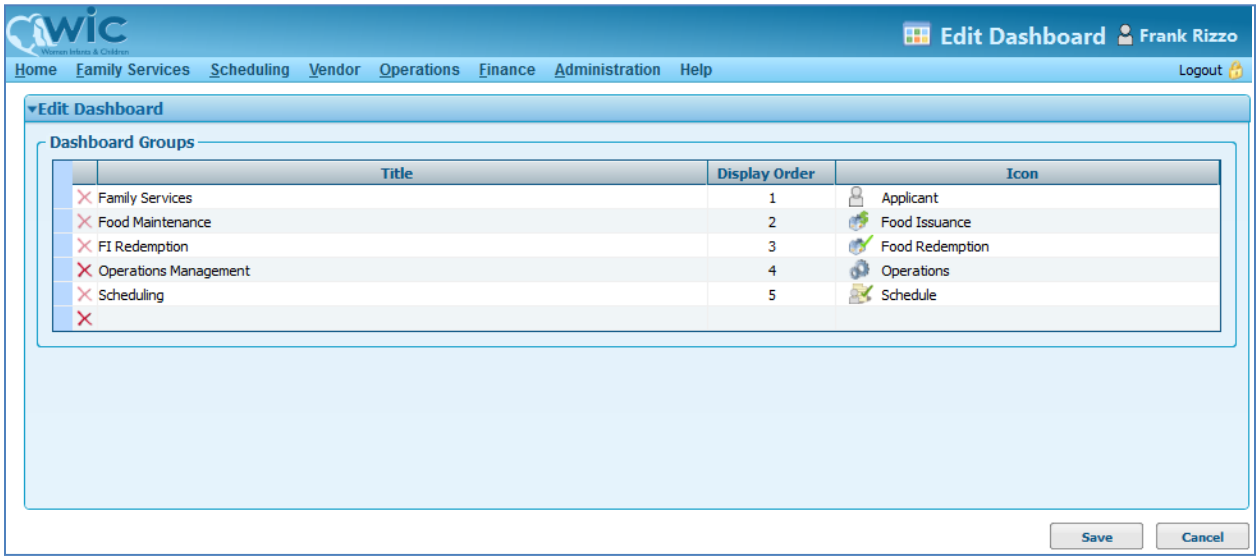


If you do not click **Save** again on the Edit Dashboard screen, your changes will be lost.

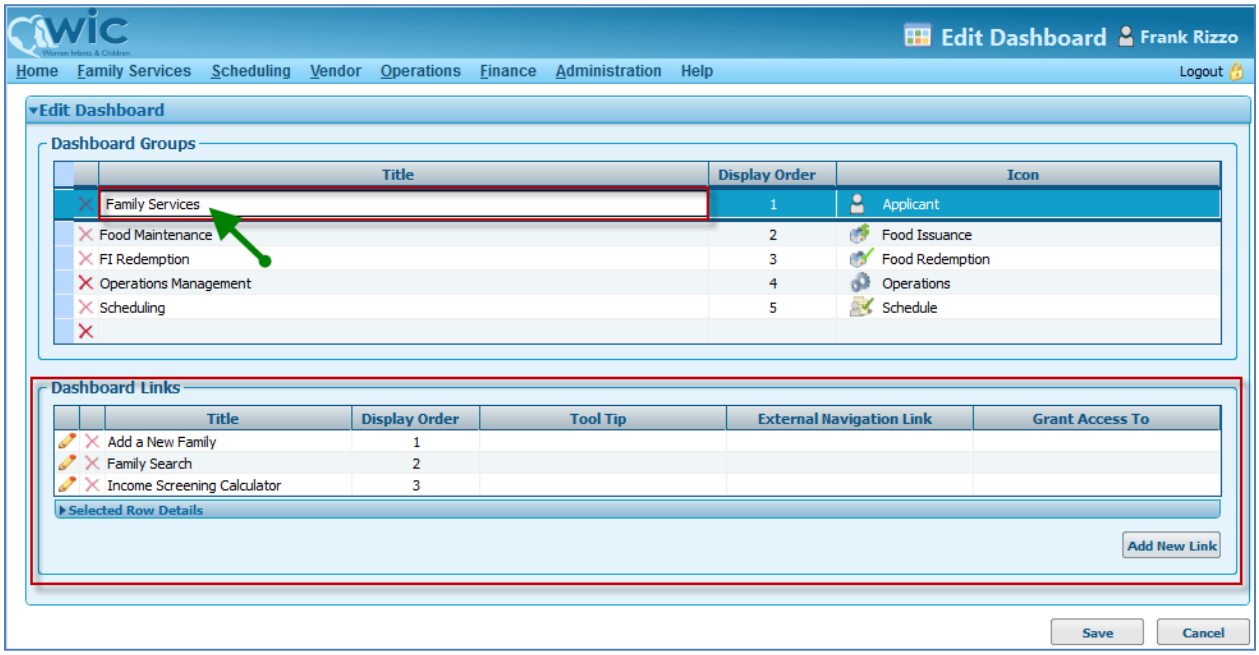
## Task F. Adding New Links to a Dashboard Group

Complete the following steps to perform this task:

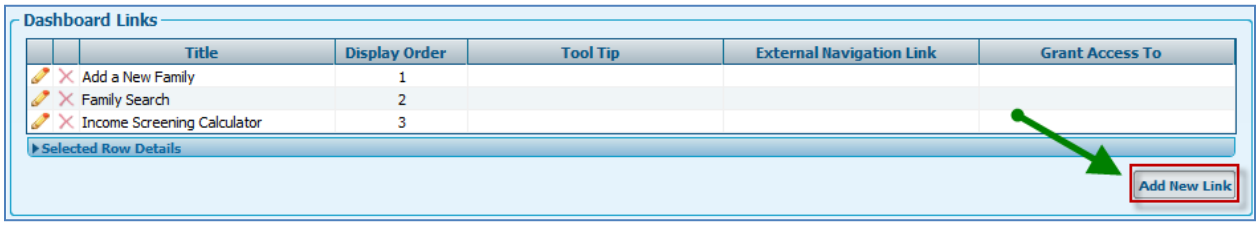
1. Access one of the Edit Dashboard screens. (For details, refer to Task A of the current scenario.)

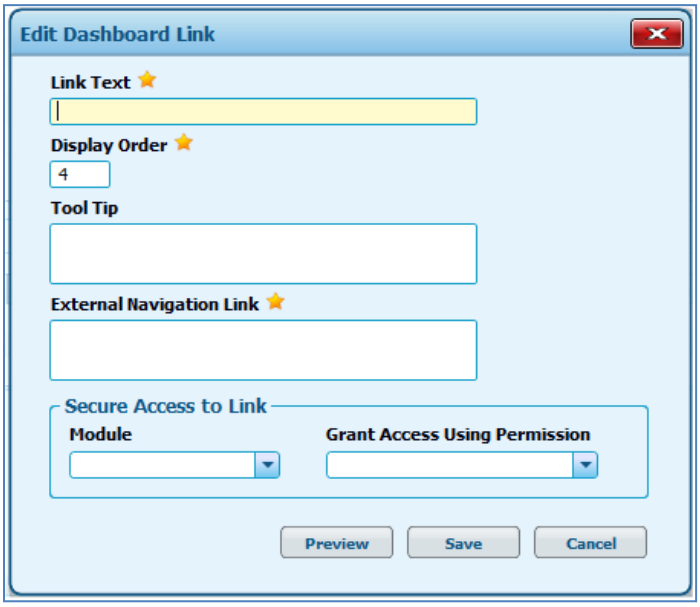



2. Under Dashboard Groups, click a row to select it. The Dashboard Links grid is refreshed to display the links associated to the selected row.



3. Under Dashboard Links, click **Add New Link**. The Edit Dashboard Link screen displays.




4. Enter the **Link Text**.

The Link Text is the actual text displayed for the users on the Dashboard screen. Users will click this text to access the external website.

Remember, new dashboard links can only be added to reference external websites. References to functions in the Crossroads WIC application can only be added during new releases of the software.

5. Enter or edit the **Display Order**.
6. Enter the **Tool Tip**.

Tool Tips are displayed when users hover their mouse over a Dashboard link.

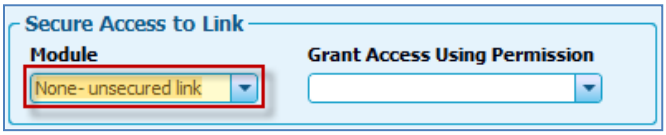
7. Enter the **External Navigation Link**.

The External Navigation Link is the URL of the external website. The URL must be entered in the following format: **http://www.website.com**.

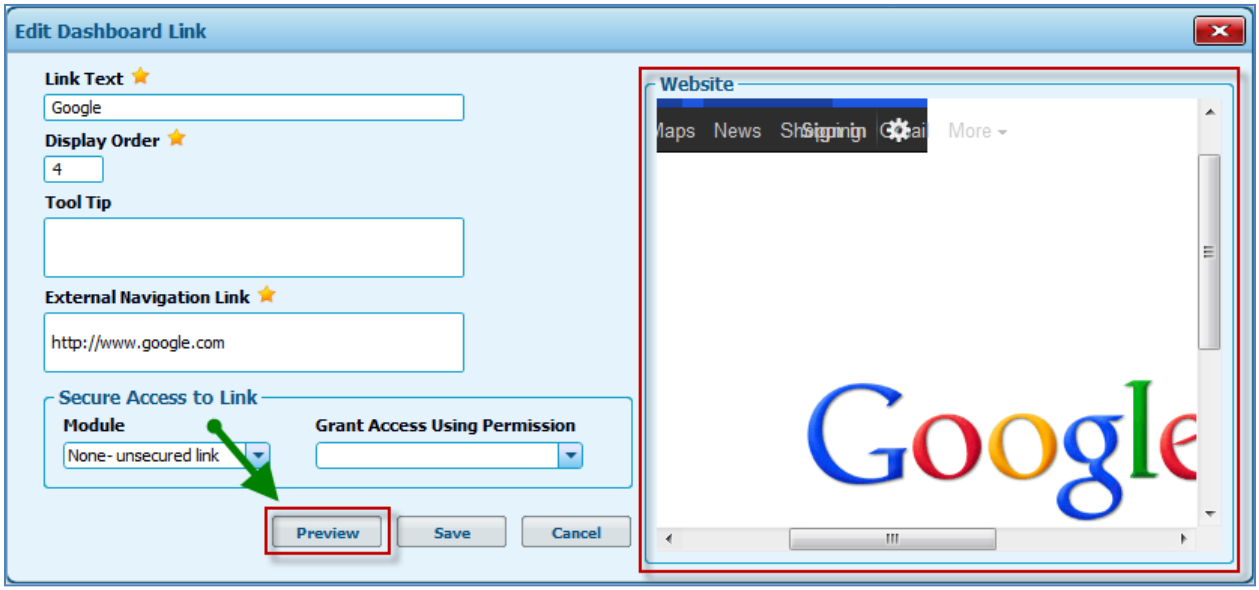
8. Under Secure Access to Link, define security permissions for the link as follows:
   - Select the Crossroads WIC **Module**.
   - Select the specific permission level from **Grant Access Using Permission**.

The **Module** selection identifies where the functionality resides. The **Grant Access Using Permission** selection provides you with a way to add previously defined security settings to the link.

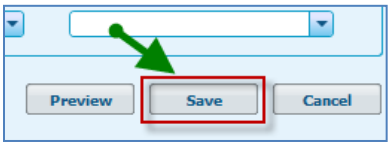
Adding security settings to the link is optional. It is permissible to have an unsecured link.



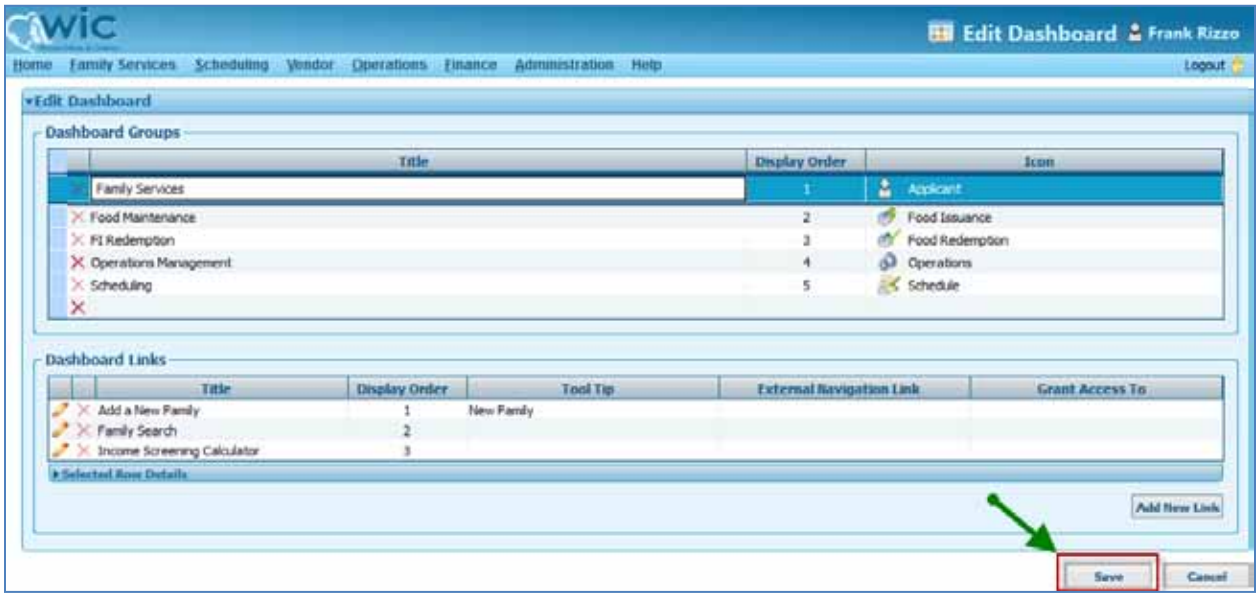

9. Click **Preview** to view the website navigation. The screen refreshes and displays the Website.




10. Click **Save**. The Edit Dashboard screen is refreshed and your changes are displayed in the Dashboard Links grid.



11. Click **Save** again on the Edit Dashboard screen.

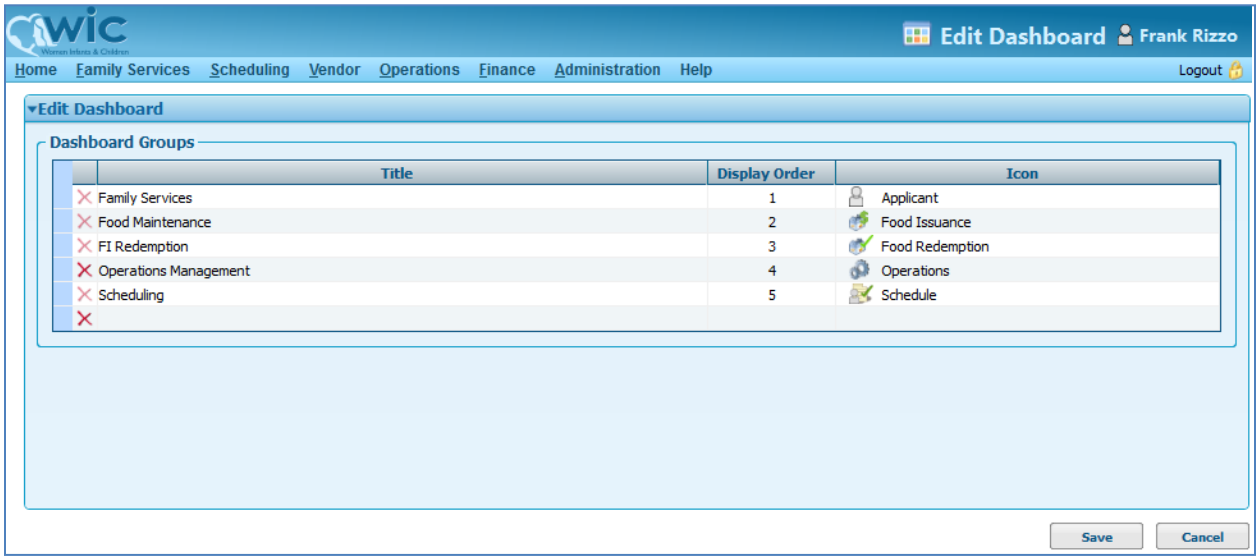


If you do not click **Save** again on the Edit Dashboard screen, your changes will be lost.

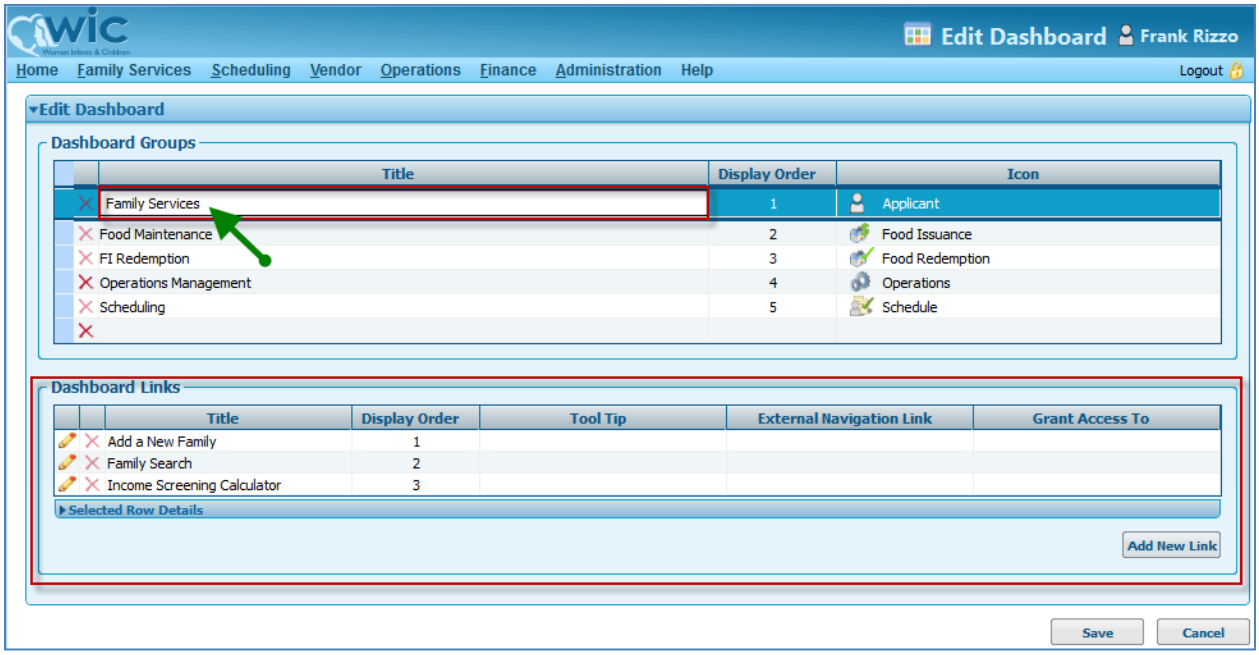
## Task G. Deleting Links from a Dashboard Group

Complete the following steps to perform this task:

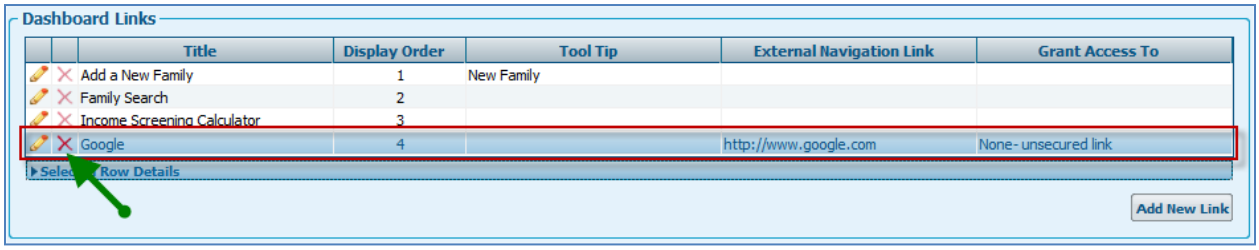
1. Access one of the Edit Dashboard screens. (For details, refer to Task A of the current scenario.)

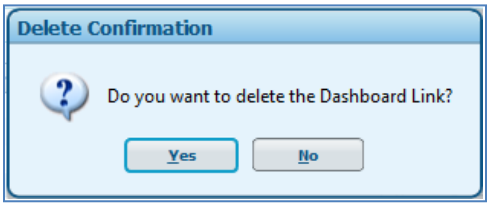



2. Under Dashboard Groups, click a row to select it. The Dashboard Links grid displays.

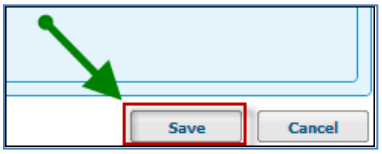


3. Under Dashboard Links, click a row to select it. Then click the delete icon ✕. The Delete Confirmation screen displays.




4. Click **Yes**. The screen is refreshed and the deleted link is removed from the Dashboard Links grid.
5. Click **Save**. A status message displays.




## Congratulations!

You have successfully accessed the three Edit Dashboard screens, viewed and edited Dashboard Groups and Link, added new groups and links to the Dashboard, and deleted groups and links from the Dashboard.

# CONFIGURATION

## Adding, Editing, and Viewing Reference Tables

### Overview

The Edit Reference Tables screen is used to maintain information contained in system data (reference) tables. Some reference tables in the system are read only and cannot be edited using this screen. Other reference tables are editable and can be modified.

This process includes the following tasks:

Task A. Viewing Read Only Reference Tables

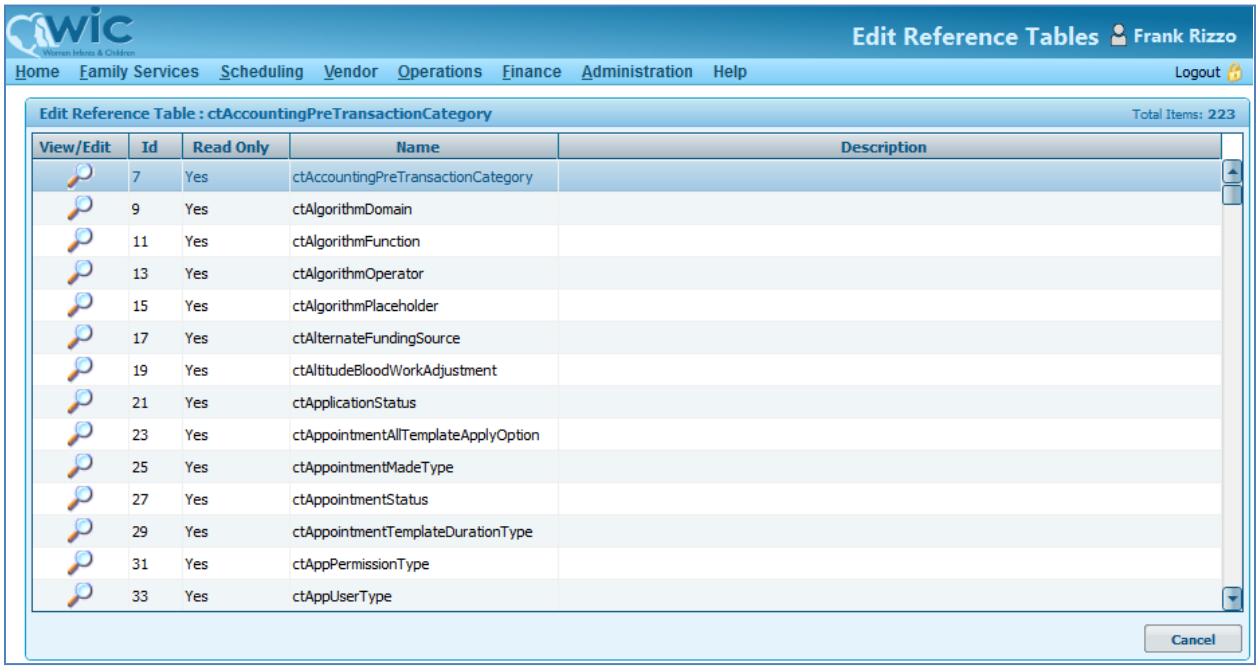
Task B. Modifying Editable Reference Tables

Task C. Adding New Items to Editable Reference Tables

## Task A. Viewing Read Only Reference Tables

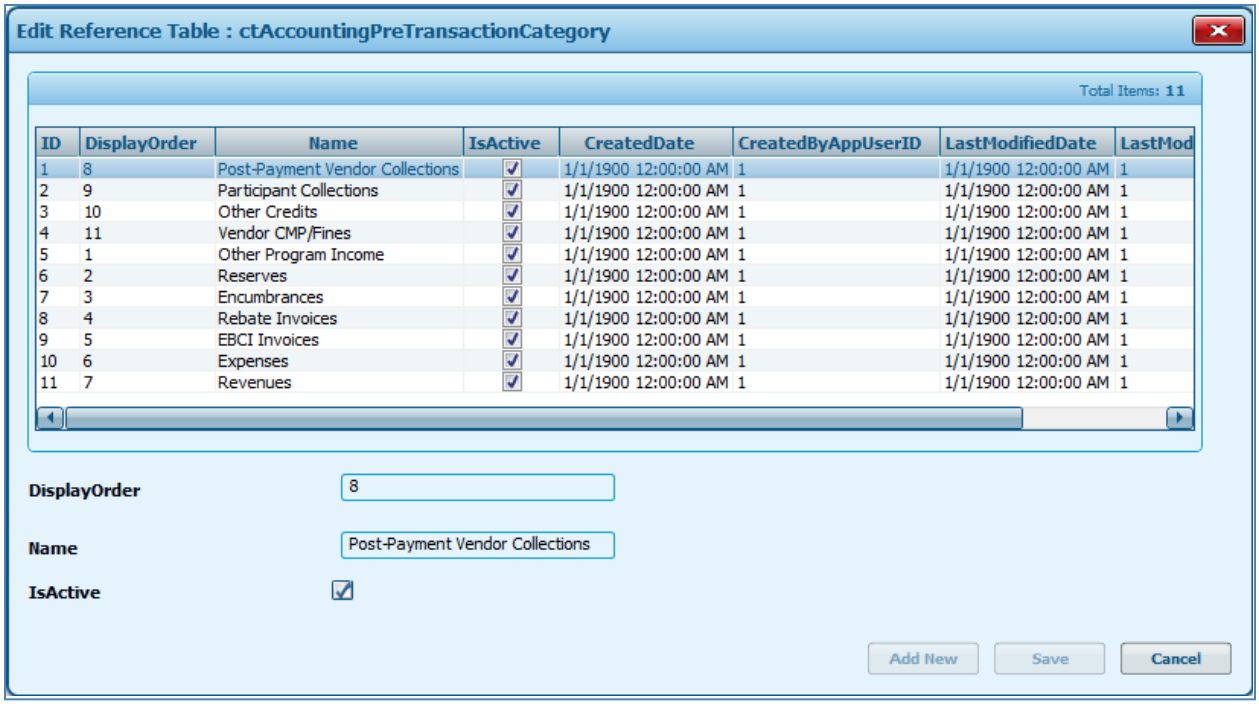
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Edit Reference Tables**. The Edit Reference Tables screen displays.

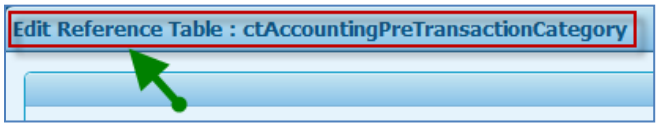



The Edit Reference Table grid displays the Name, ID, and Description for each reference table. Additionally, this grid indicates if the reference table is read only. Read only tables display a magnifying glass icon under View/Edit and cannot be modified. Editable tables contain a pencil icon under View/Edit and can be modified.

2. Double-click a read only record in the Edit Reference Table grid, or click the magnifying glass icon to view the reference table details. The Edit Reference Table screen displays.

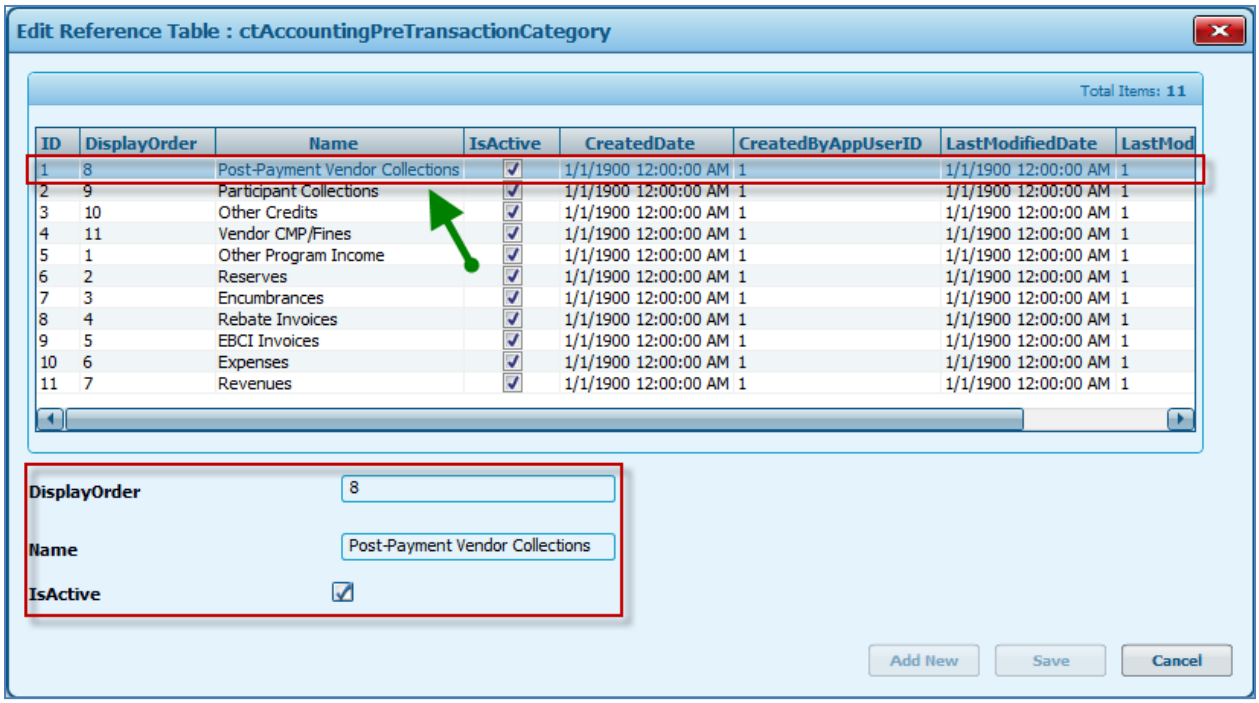

Edit Reference Table : ctAccountingPreTransactionCategory
Total Items: 11
ID DisplayOrder Name IsActive CreatedDate CreatedByAppUserID LastModifiedDate LastMod
1 8 Post-Payment Vendor Collections 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
2 9 Participant Collections 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
3 10 Other Credits 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
4 11 Vendor CMP/Fines 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
5 1 Other Program Income 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
6 2 Reserves 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
7 3 Encumbrances 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
8 4 Rebate Invoices 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
9 5 EBCI Invoices 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
10 6 Expenses 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
11 7 Revenues 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
DisplayOrder
8
Name
Post-Payment Vendor Collections
IsActive
Add New
Save
Cancel

3. View the name of the selected reference table at the top of the screen.

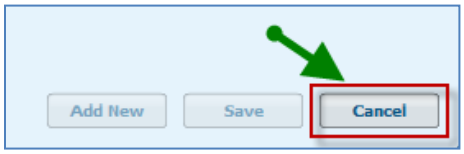



The Edit Reference Table grid displays all items stored in the selected reference table.

4. Click a row in the grid to view that item's details as follows:
   - View the item's **Display Order**.
   - View the item's **Name**.
   - View the indication of whether the item **Is Active**.


Edit Reference Table : ctAccountingPreTransactionCategory
Total Items: 11
ID DisplayOrder Name IsActive CreatedDate CreatedByAppUserID LastModifiedDate LastMod
1 8 Post-Payment Vendor Collections 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
2 9 Participant Collections 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
3 10 Other Credits 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
4 11 Vendor CMP/Fines 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
5 1 Other Program Income 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
6 2 Reserves 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
7 3 Encumbrances 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
8 4 Rebate Invoices 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
9 5 EBCI Invoices 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
10 6 Expenses 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
11 7 Revenues 1/1/1900 12:00:00 AM 1 1/1/1900 12:00:00 AM 1
DisplayOrder 8
Name Post-Payment Vendor Collections
IsActive
Add New
Save
Cancel

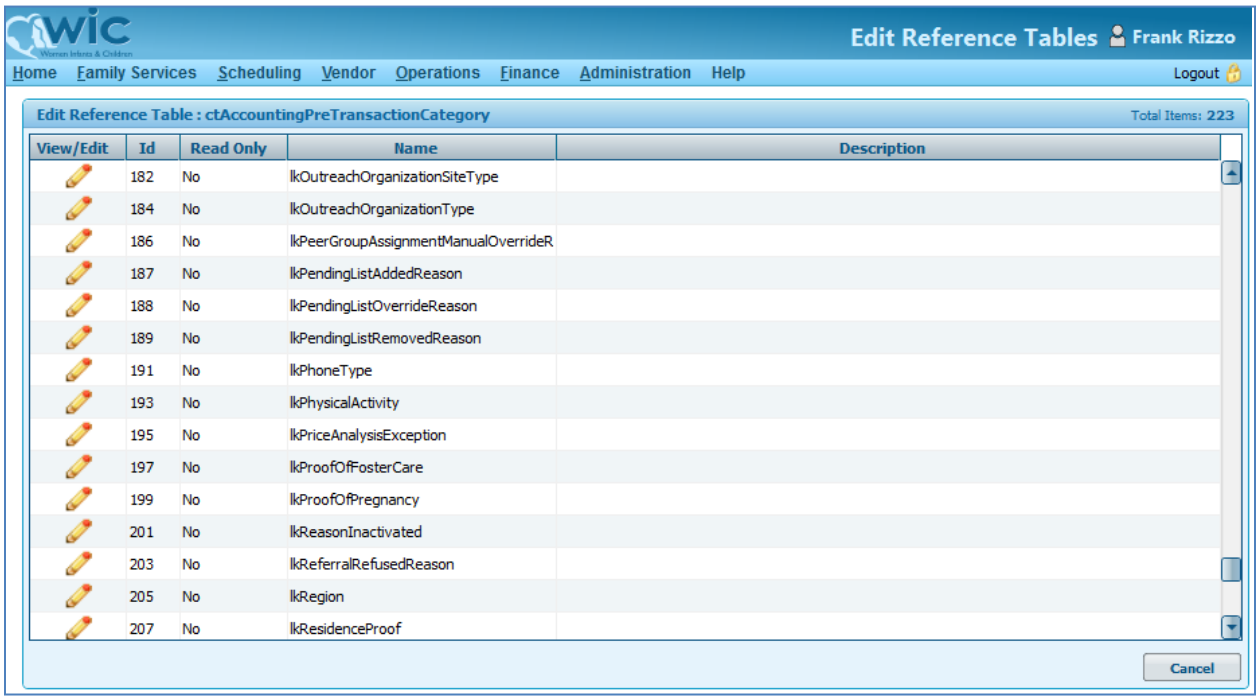
5. Click **Cancel** to return to the Edit Reference Tables screen.



## Task B. Modifying Editable Reference Tables

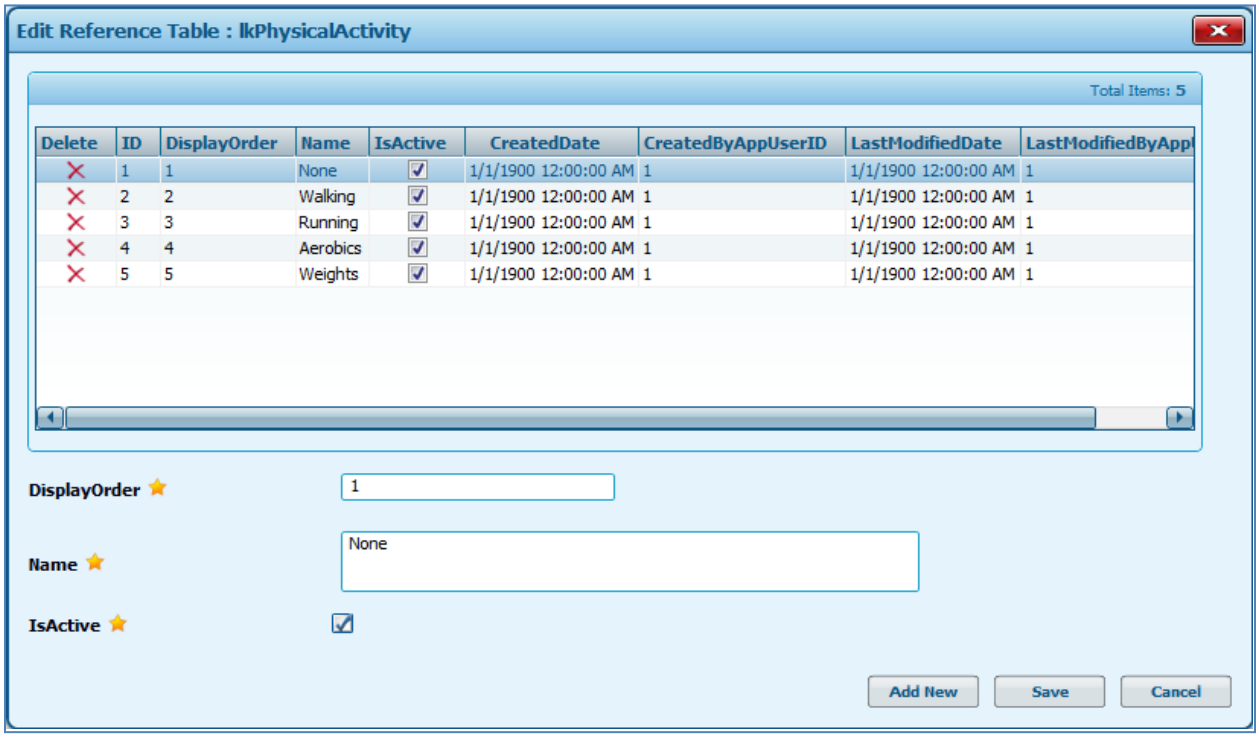
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Edit Reference Tables**. The Edit Reference Tables screen displays.

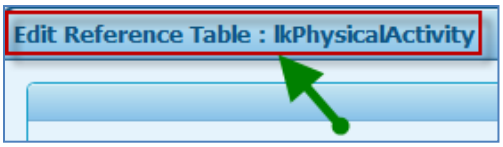



The Edit Reference Table grid displays the Name, ID, and Description for each reference table. Additionally, this grid indicates if the reference table is read only. Read only tables display a magnifying glass icon under View/Edit and cannot be modified. Editable tables contain a pencil icon under View/Edit and can be modified.

2. Double-click an editable record in the Edit Reference Table grid, or click the pencil icon to view and edit the reference table details. The Edit Reference Table screen displays.




3. View the name of the selected reference table at the top of the screen.



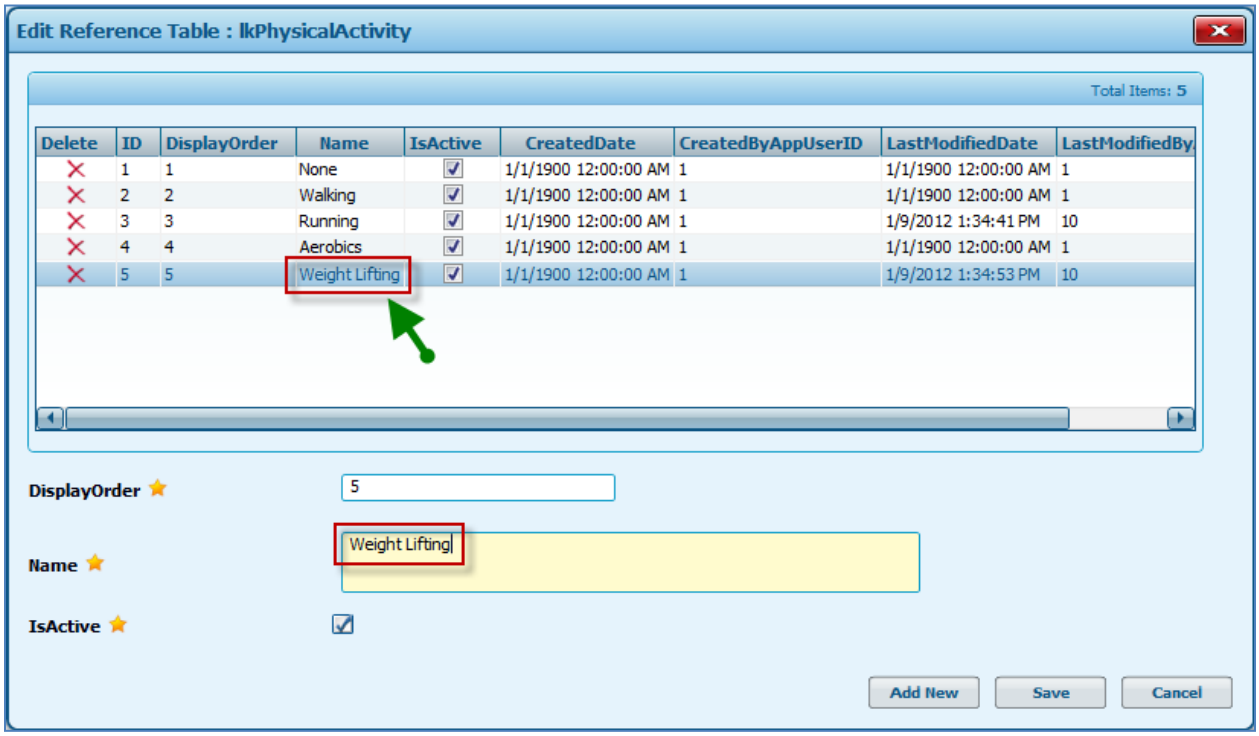

The Edit Reference Table grid displays all items stored in the selected reference table.

4. Click a row in the grid to display and edit that item's details as follows:

- Enter or edit the item's **Display Order**.
- Enter or edit the item's **Name**.
- Enter or edit the indication of whether the item **Is Active**.

The changes you make here will be automatically updated in the Edit Reference Table grid.

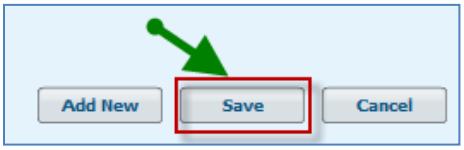
Certain reference tables may require the completion of additional field options.




5. Click the delete icon ✕ to delete an item from the reference table.

Take care when deleting items from the reference table. No confirmation message is provided.

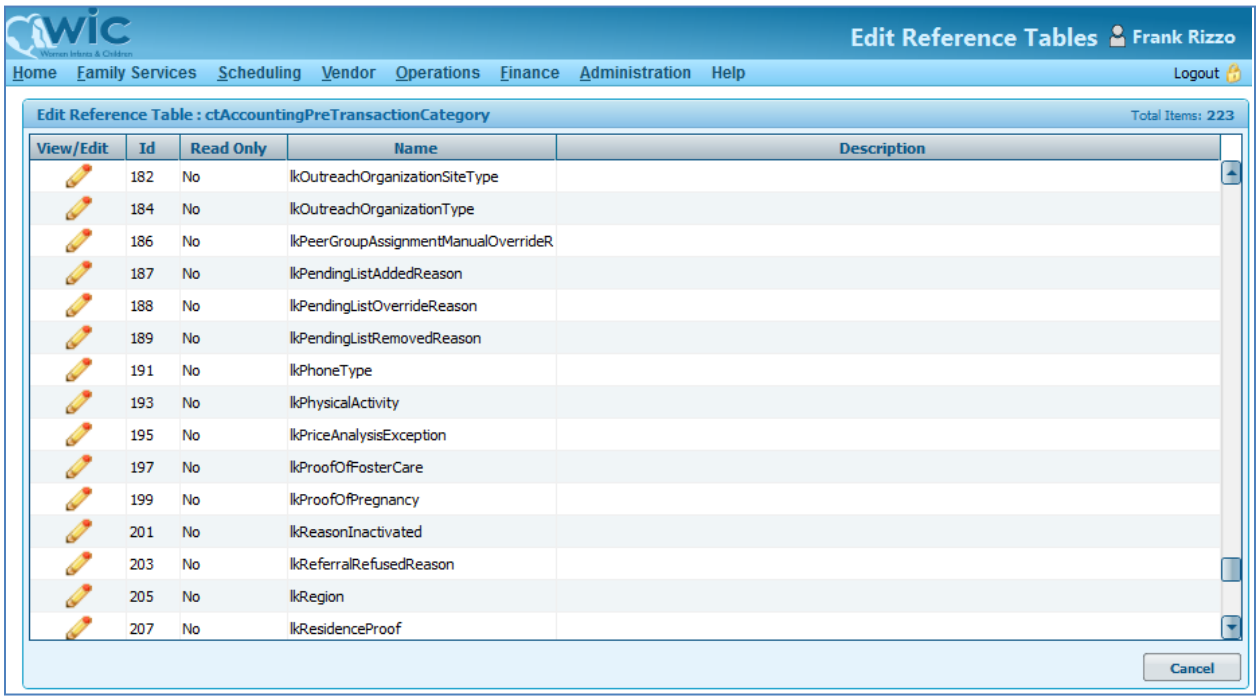
6. Click **Save** to return to the Edit Reference Tables screen. A status message displays.



## Task C. Adding New Items to Editable Reference Tables

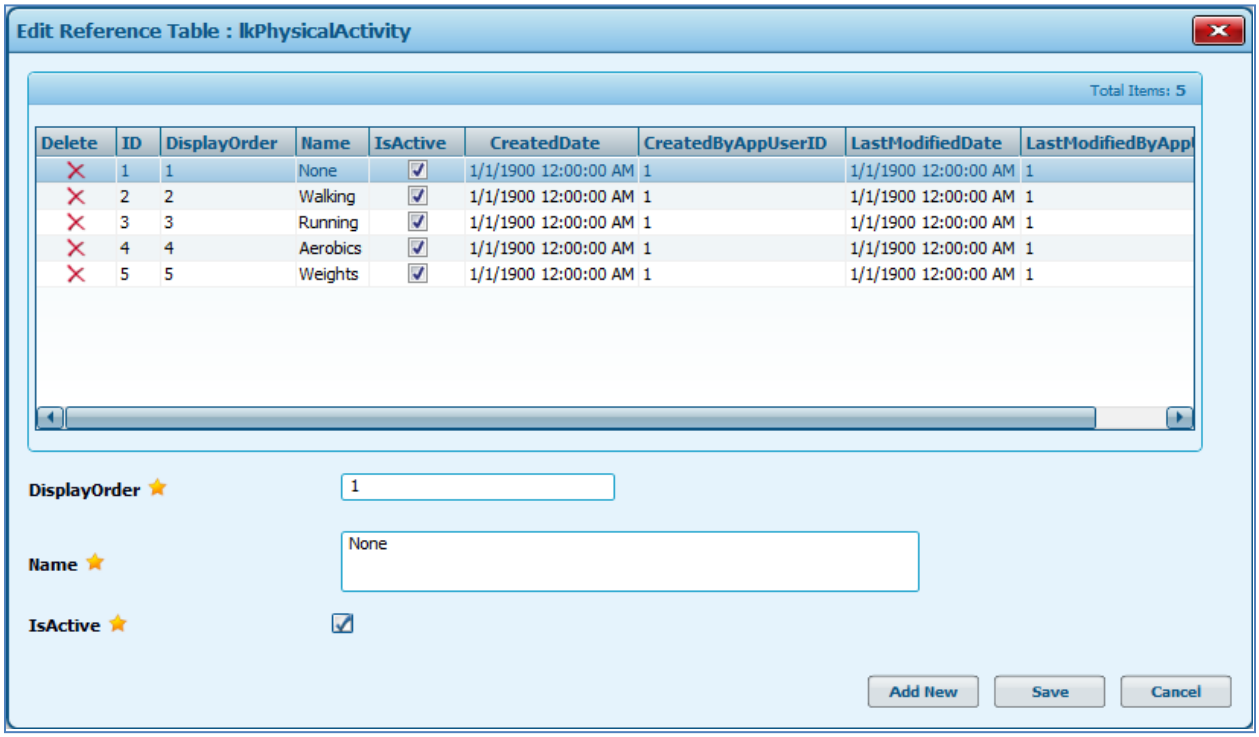
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Edit Reference Tables**. The Edit Reference Tables screen displays.

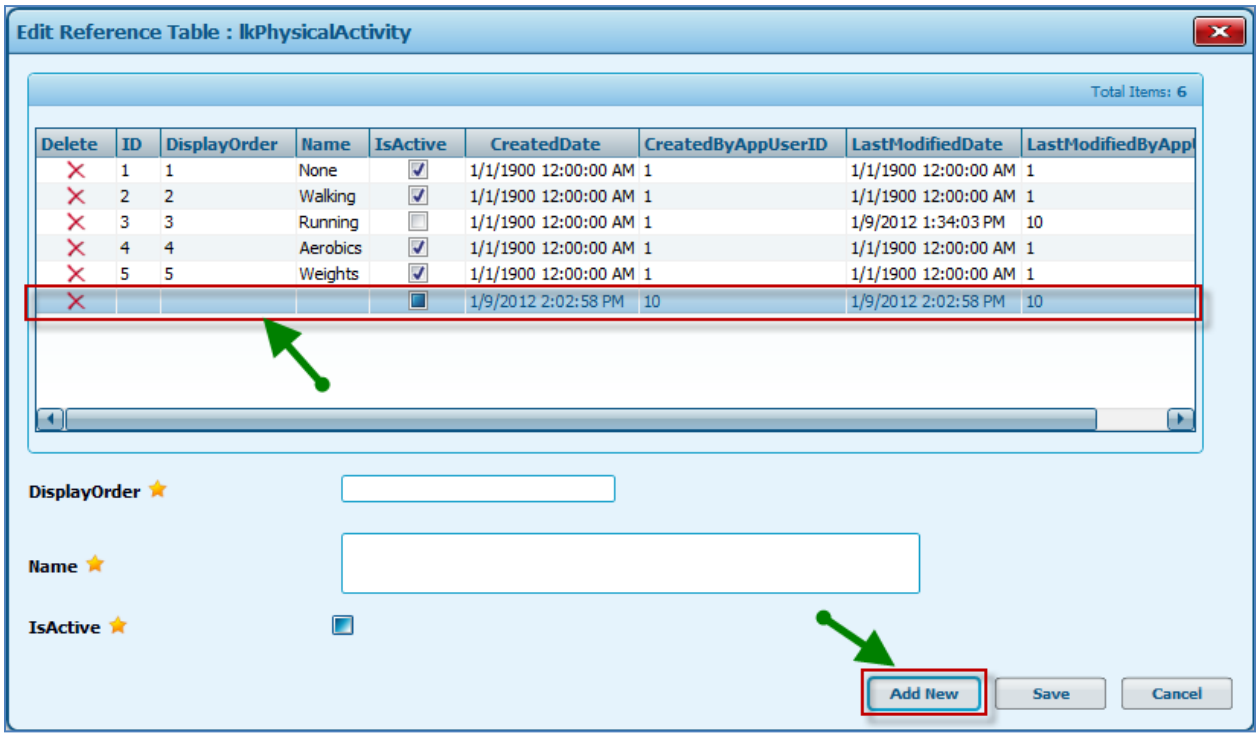



The Edit Reference Table grid displays the Name, ID, and Description for each reference table. Additionally, this grid indicates if the reference table is read only. Read only tables display a magnifying glass icon under View/Edit and cannot be modified. Editable tables contain a pencil icon under View/Edit and can be modified.

2. Double-click an editable record in the Edit Reference Table grid, or click the pencil icon to view and edit the reference table details. The Edit Reference Table screen displays.




3. Click **Add New**. An additional line is added at the bottom of the Edit Reference Table grid.

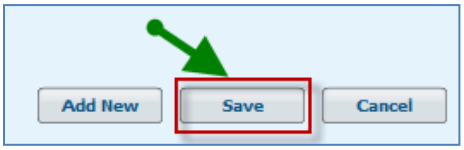


4. Enter the new item's details as follows:
   - Enter the item's **Display Order**.
   - Enter the item's **Name**.
   - Enter the indication of whether the item **Is Active**.

The changes you make here will be automatically updated in the Edit Reference Table grid.

Certain reference tables may require the completion of additional field options.

5. Click **Save** to return to the Edit Reference Tables screen. A status message displays.




## Congratulations!

You have successfully viewed referenced tables, edited reference tables, and added new items to reference tables.

# CONFIGURATION

## Managing System Settings

### Overview

The Configuration Settings screen is used to define and maintain numerous settings for various functions throughout the application. Settings defined on this screen will be applied system-wide and will affect all system users. The Configuration Settings screen is broken into a number of module groups for organization and ease of use. Use the scroll bar at the right-hand side of the screen to display all configuration options.

This process includes the following tasks:

Task A. Managing Clinic Configuration Settings

Task B. Managing Food Configuration Settings

Task C. Managing Vendor Configuration Settings

Task D. Managing Appointment Configuration Settings

Task E. Managing Finance Configuration Settings

Task F. Managing External Interfaces Configuration Settings

Task G. Managing Communication Configuration Settings

Task H. Managing Operations Configuration Settings

Task I. Managing Security Configuration Settings

Task J. Managing EBT State Configuration Settings

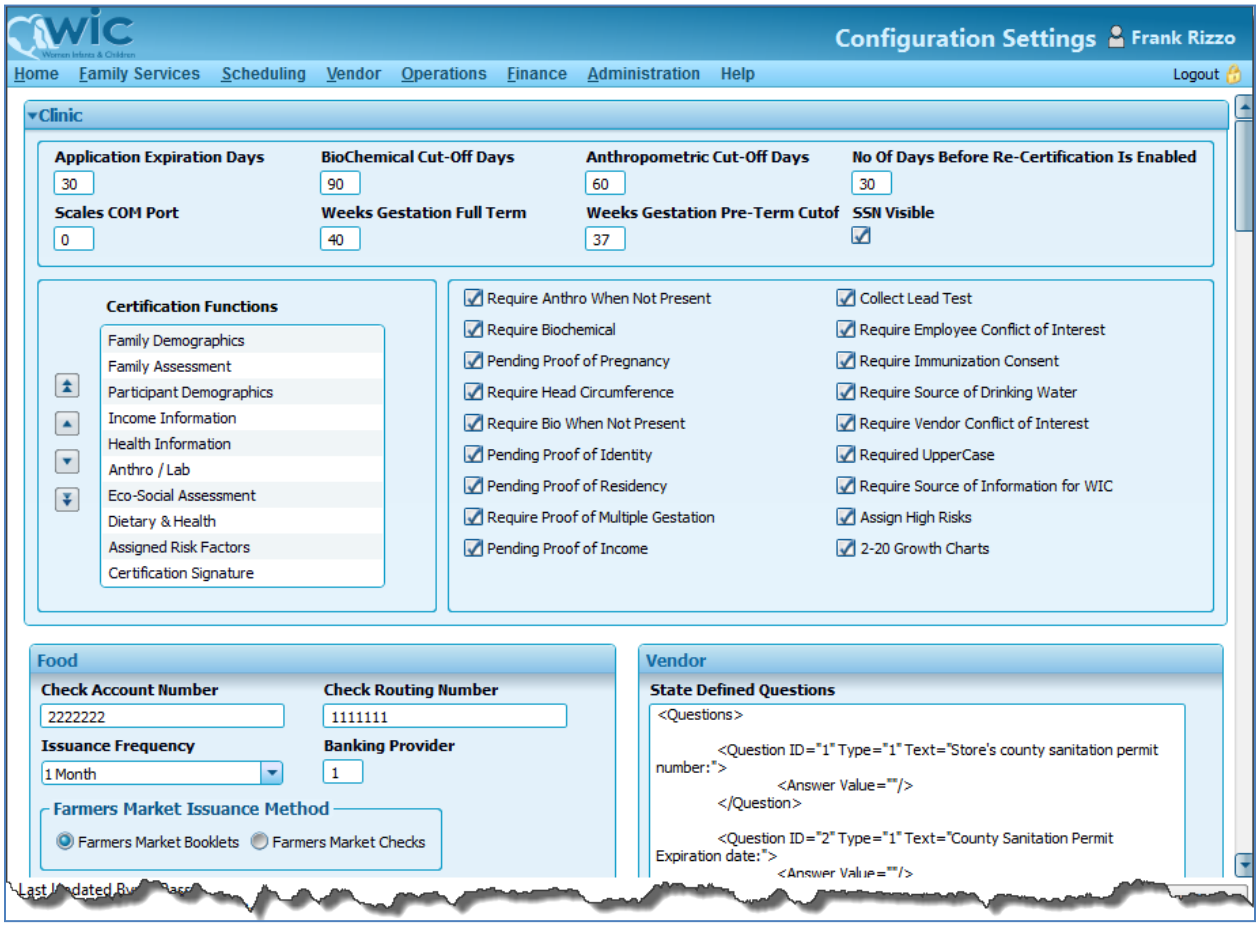
Task K. Managing Participant Portal State Configuration Settings

Task L. Managing State Holiday Configuration Settings

## Task A. Managing Clinic Configuration Settings

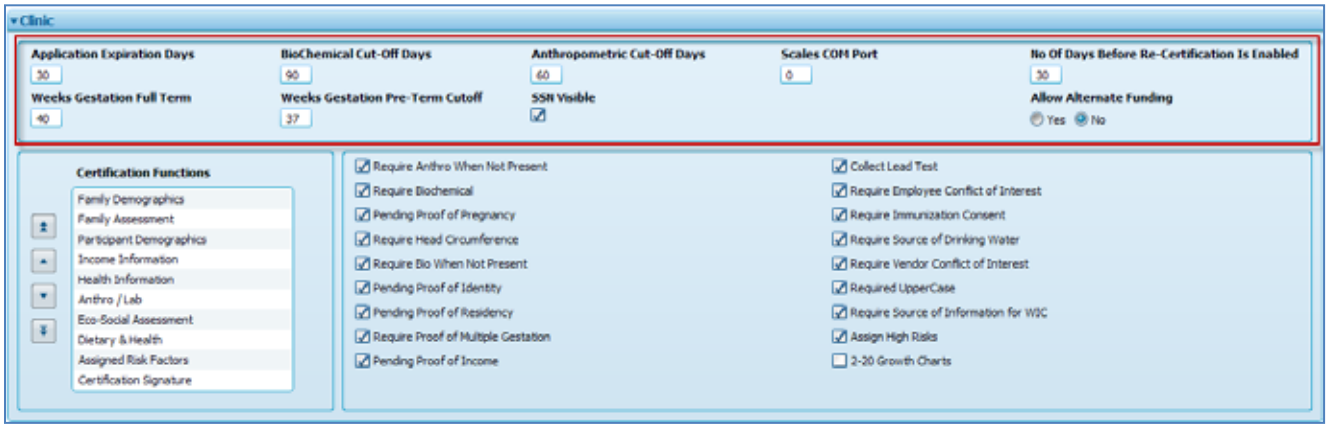
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.



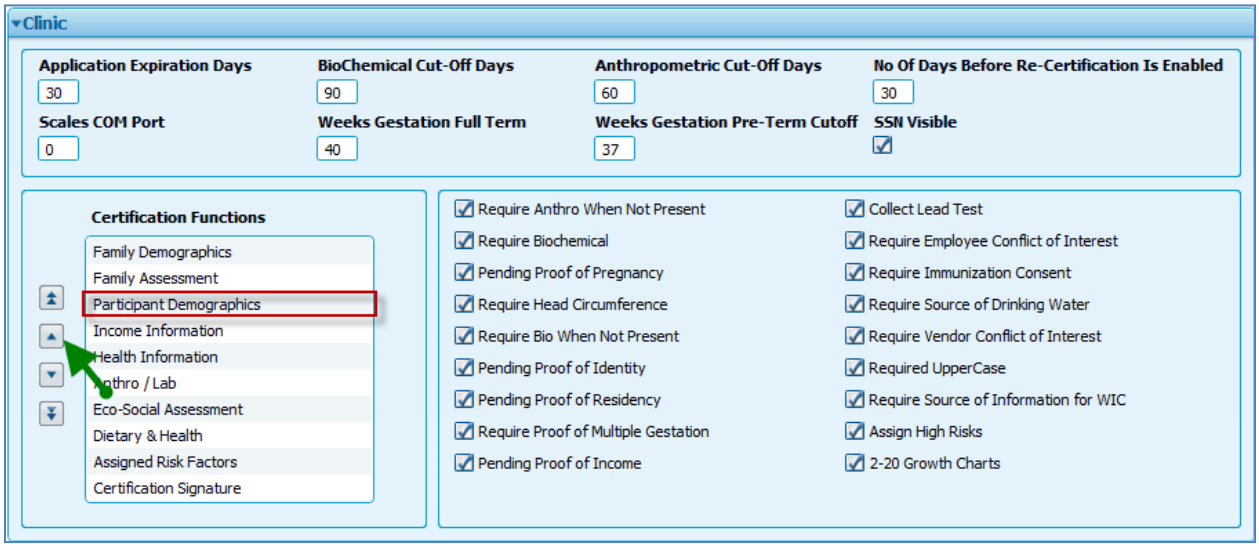
2. Under Clinic, manage the Clinic module configuration settings as follows:

   - Enter or edit the **Application Expiration Days**.
   - Enter or edit the **BioChemical Cut-Off Days**.
   - Enter or edit the **Anthropometric Cut-Off Days**.
   - Enter or edit the **Scales COM Port**.
   - Enter or edit the **Number of Days Before Re-Certification Is Enabled**.
   - Enter or edit the **Weeks Gestation Full Term**.
   - Enter or edit the **Weeks Gestation Pre-Term Cutoff**.
   - Check the box to indicate if **SSN Visible**.
   - Indication whether alternate funding is allowed by selecting an Allow Alternate Funding option.

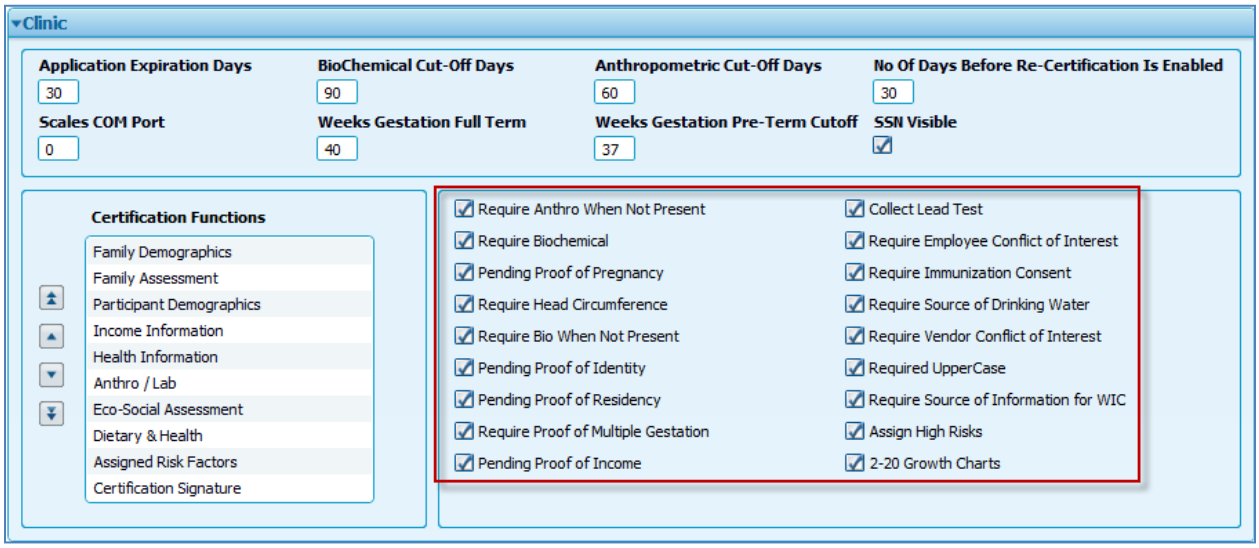



3. Under Certification Functions, highlight a function in the list to select it. Then, click the arrows as follows to indicate the order in which the functions will appear in the certification process:

   - Click the up arrow to move the function up one position.
   - Click the down arrow to move the function down one position.
   - Click the double-up arrow to move the function to the top of the list.
   - Click the double-down arrow to move the function to the bottom of the list.



4. Check the boxes to enable (turn-on) or disable (turn-off) these certification related items.



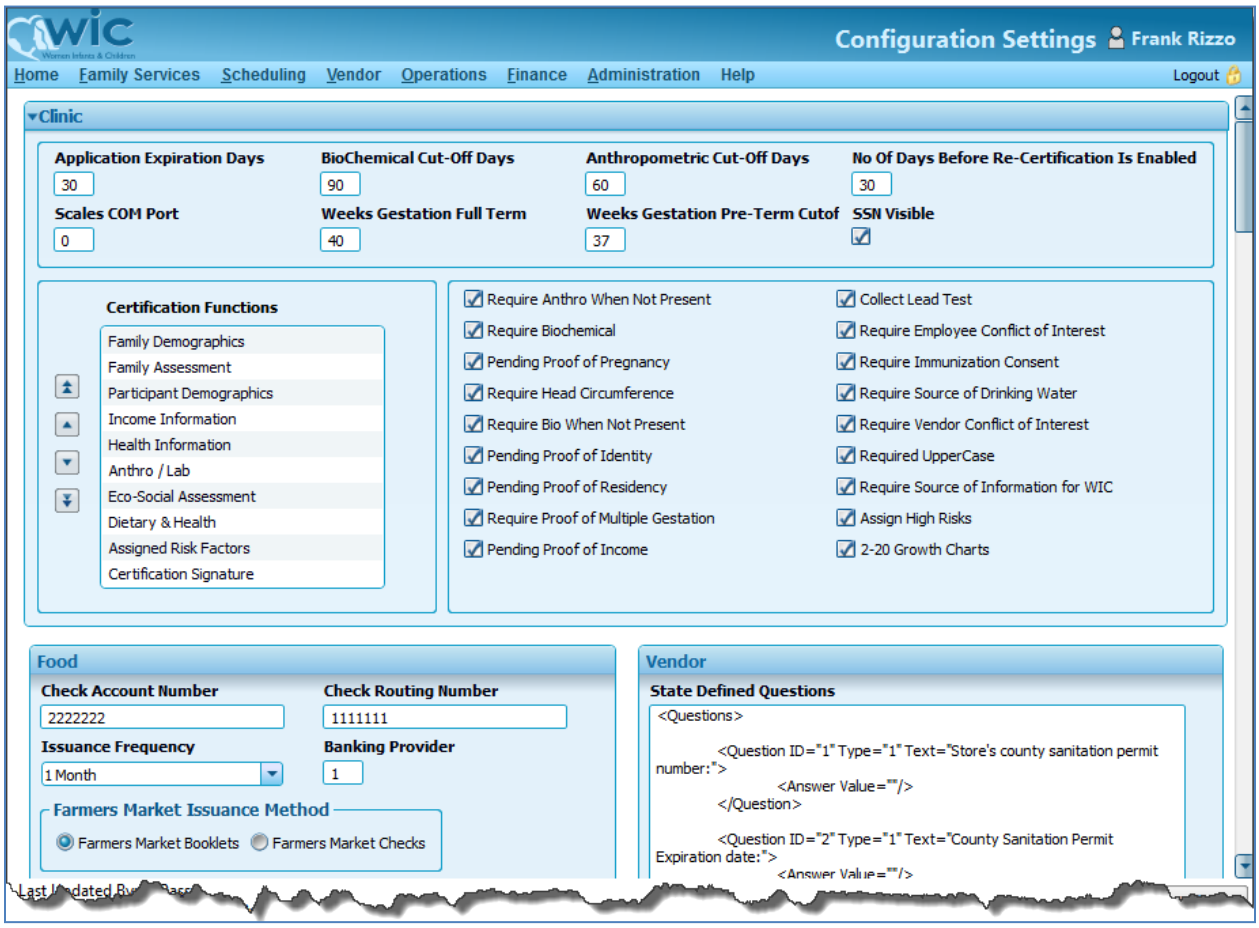

When a box is checked ☑, the item is enabled. When a box is not checked ☐, the item is disabled.

5. Click **Update** to save the configuration settings.

## Task B. Managing Food Configuration Settings

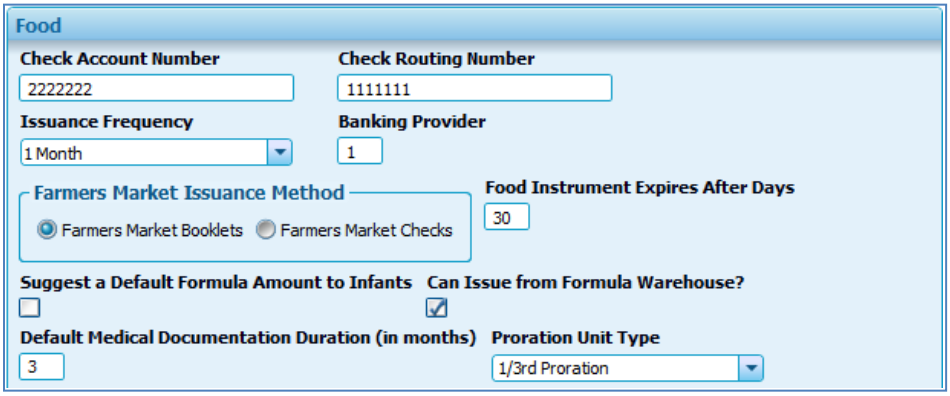
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.



2. Under Food, manage the Food module configuration settings as follows:

   - Enter or edit the **Check Account Number**.
   - Enter or edit the **Check Routing Number**.
   - Select the **Issuance Frequency**.
   - Enter or edit the **Banking Provider**.
   - Under Farmers Market Issuance Method, indicate whether **Farmers Market Booklets** or **Farmers Market Checks** are issued.
   - Enter or edit the **Food Instrument Expires After Days**.
   - Check the box to **Suggest a Default Formula Amount to Infants**.
   - Check the box to indicate if the system **Can Issue from Formula Warehouse**.
   - Enter or edit the **Default Medical Documentation Duration (in months)**.
   - Select the **Proration Unit Type**.




The **Banking Provider** value entered indicates a certain financial institution.

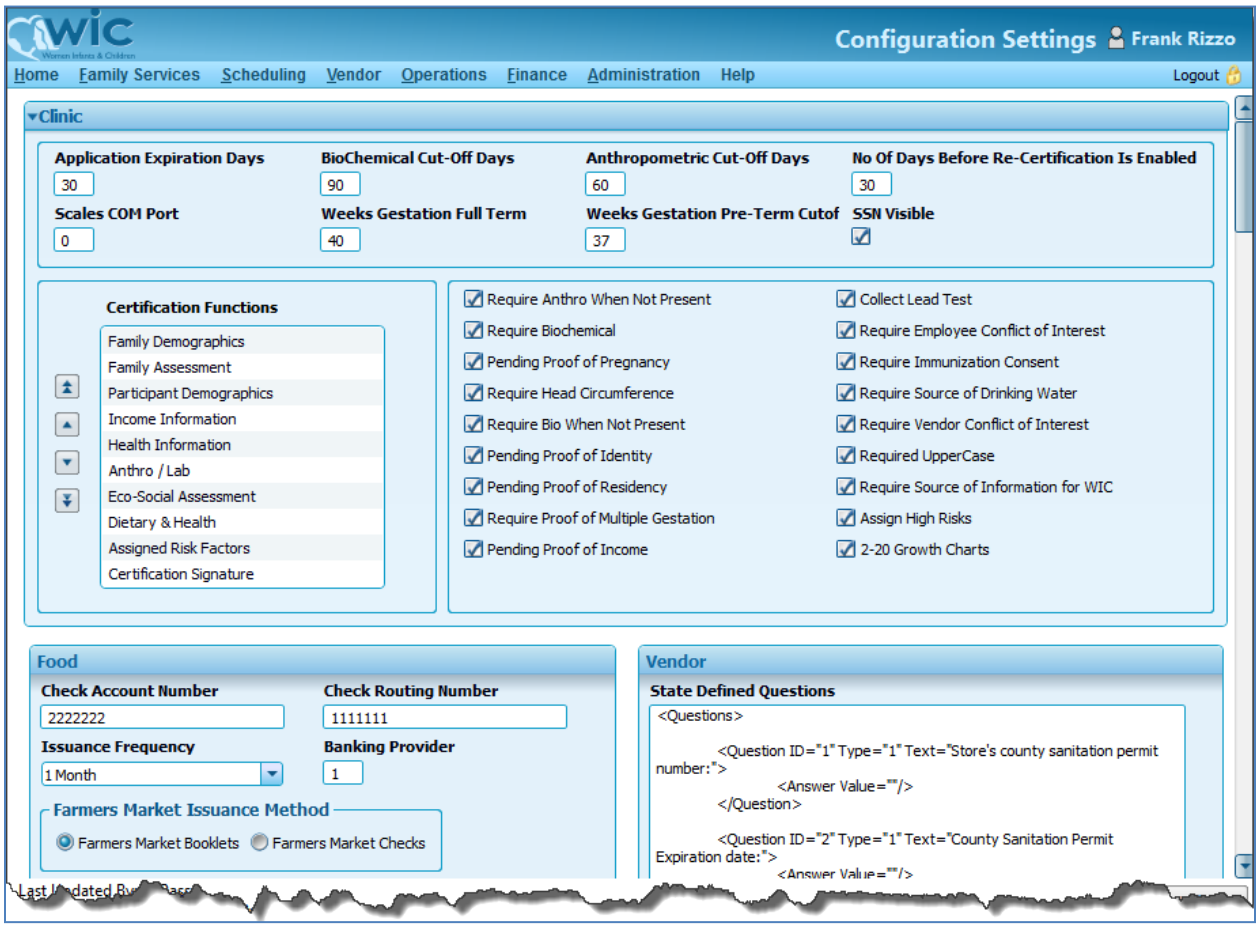
If **Suggest a Default Formula Amount to Infants** is not checked, the Default Formula Amount will be blank during the benefit issuance process.

3. Click **Update** to save the configuration settings.

## Task C. Managing Vendor Configuration Settings

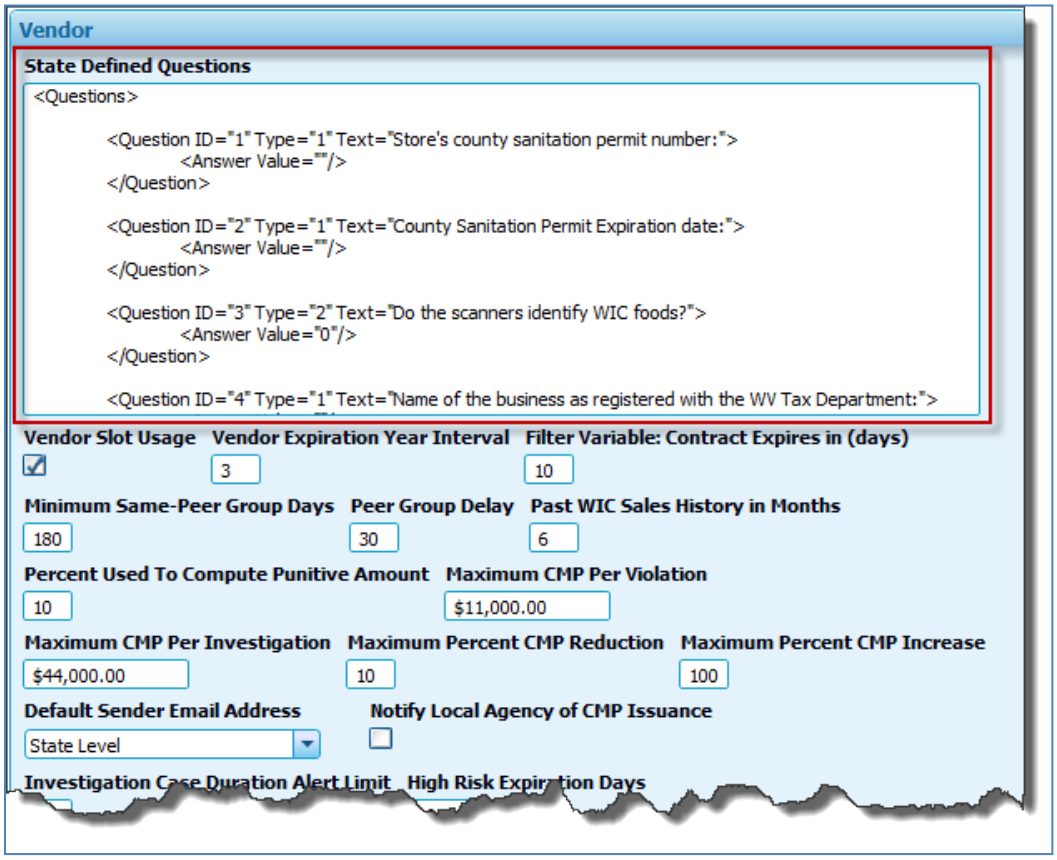
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.



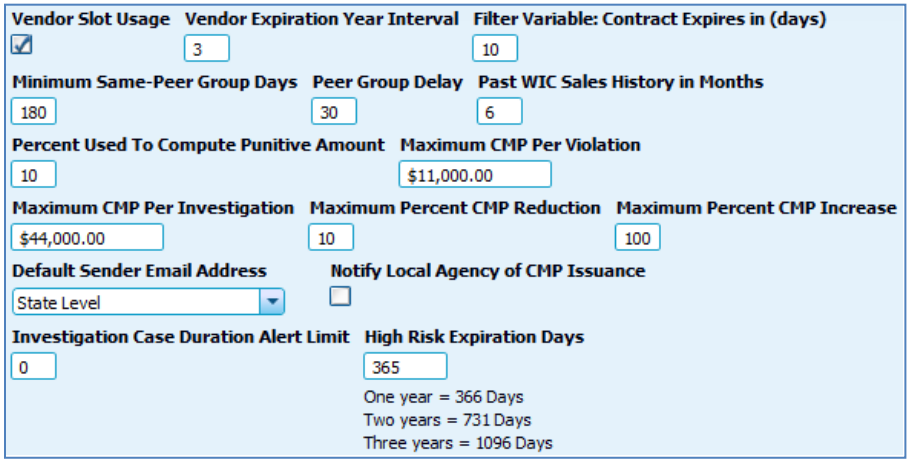

2. Under Vendor, State Defined Questions, enter or edit the **Question** and **Answer Values**.

The State Defined Questions are maintained in an XML-structured list. These questions will be prompted on the Vendor Application screen. Each question has a Question ID. ID="1" represents a Text-entry question. ID="2" represents a Yes/No question. ID="3" represents a check box and text entry question. ID="4" represents a multi-select question.


Vendor
State Defined Questions
<Questions>
<Question ID="1" Type="1" Text="Store's county sanitation permit number:">
<Answer Value=""/>
</Question>
<Question ID="2" Type="1" Text="County Sanitation Permit Expiration date:">
<Answer Value=""/>
</Question>
<Question ID="3" Type="2" Text="Do the scanners identify WIC foods?">
<Answer Value="0"/>
</Question>
<Question ID="4" Type="1" Text="Name of the business as registered with the WV Tax Department:">
Vendor Slot Usage
Vendor Expiration Year Interval
3
Filter Variable: Contract Expires in (days)
10
Minimum Same-Peer Group Days
180
Peer Group Delay
30
Past WIC Sales History in Months
6
Percent Used To Compute Punitive Amount
10
Maximum CMP Per Violation
$11,000.00
Maximum CMP Per Investigation
$44,000.00
Maximum Percent CMP Reduction
10
Maximum Percent CMP Increase
100
Default Sender Email Address
State Level
Notify Local Agency of CMP Issuance
Investigation Case Duration Alert Limit
High Risk Expiration Days

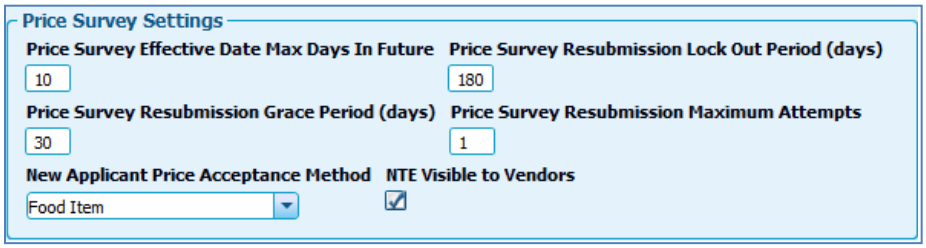
3. Under Vendor, manage additional Vendor module configuration settings as follows:

   - Check the box to indicate **Vendor Slot Usage**.
   - Enter or edit the **Vendor Expiration Year Interval**.
   - Enter or edit the **Filter Variable: Contract Expires in (days)**.
   - Enter or edit the **Minimum Same-Peer Group Days**.
   - Enter or edit the **Peer Group Delay**.
   - Enter or edit the **Past WIC Sales History in Months**.
   - Enter or edit the **Percent Used to Compute Punitive Amount**.
   - Enter or edit the **Maximum CMP Per Violation**.
   - Enter or edit the **Maximum CMP Per Investigation**.
   - Enter or edit the **Maximum Percent CMP Reduction**.
   - Enter or edit the **Maximum Percent CMP Increase**.
   - Select the **Default Sender Email Address**.
   - Check the box to **Notify Local Agency of CMP Issuance**.
   - Enter or edit the **Investigation Case Duration Alert Limit**.
   - Enter or edit the **High Risk Expiration Days**.



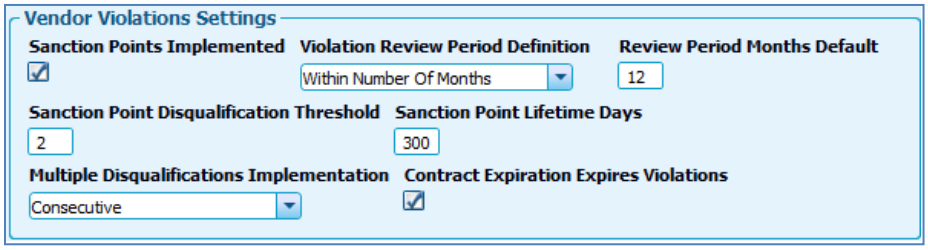

4. Under Price Survey Settings, manage additional configuration settings as follows:

   - Enter or edit the **Price Survey Effective Date Max Days in Future**.
   - Enter or edit the **Price Survey Resubmission Lock Out Period (days)**.
   - Enter or edit the **Price Survey Resubmission Grace Period (days)**.
   - Enter or edit the **Price Survey Resubmission Maximum Attempts**.
   - Select the **New Applicant Price Acceptance Method**.
   - Check the box to indicate if **NTE Visible to Vendors**.



5. Under Monitoring Visits Settings, manage additional configuration settings as follows:
   - Enter or edit the **Monitoring Visit Review Periods Per Year**.
   - Enter or select the **Monitoring Visit Review Start Date**.

6. Under Vendor Violations Settings, manage additional configuration settings as follows:
   - Check the box to indicate if **Sanction Points Implemented**.
   - Select the **Violation Review Period Definition**.
   - Enter or edit the **Review Period Months Default**.
   - Enter or edit the **Sanction Point Disqualification Threshold**.
   - Enter or edit the **Sanction Point Lifetime Days**.
   - Select the **Multiple Disqualifications Implementation**.
   - Check the box to indicate if **Contract Expiration Expires Violations**.

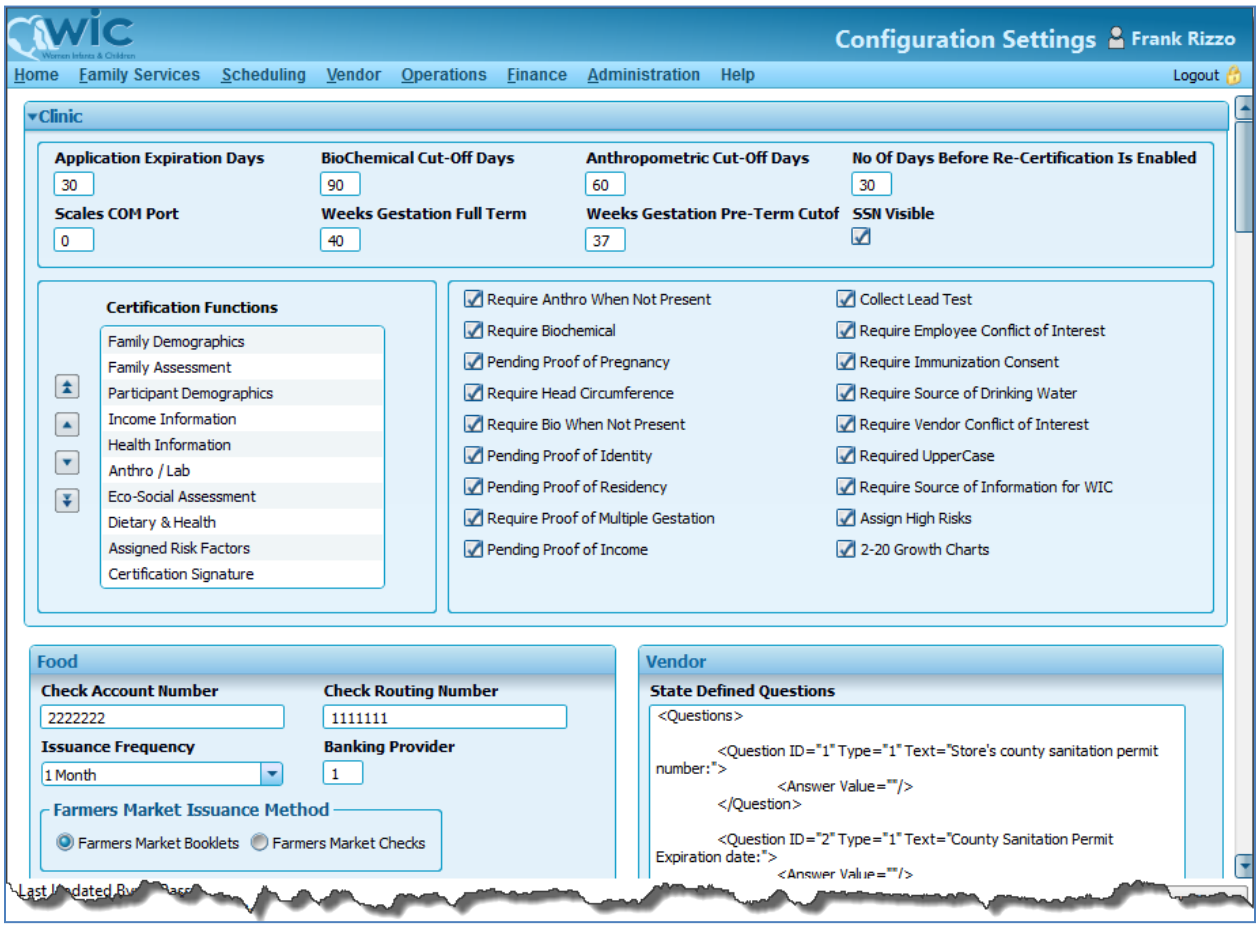



7. Click **Update** to save the configuration settings.

## Task D. Managing Appointment Configuration Settings

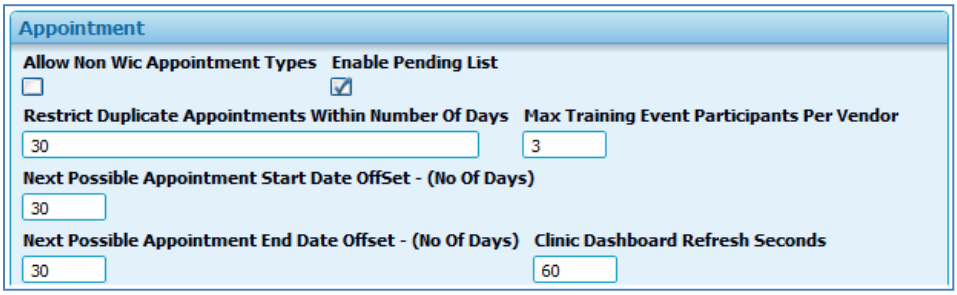
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.



2. Under Appointment, manage the Appointment module configuration settings as follows:

   - Check the box to **Allow Non Wic Appointment Types**.
   - Check the box to **Enable Pending List**.
   - Enter or edit the **Restrict Duplicate Appointments Within Number of Days**.
   - Enter or edit the **Max Training Event Participants Per Vendor**.
   - Enter or edit the **Next Possible Appointment Start Date Offset – (No of Days)**.
   - Enter or edit the **Next Possible Appointment End Date Offset – (No of Days)**.
   - Enter or edit the **Clinic Dashboard Refresh Seconds**.

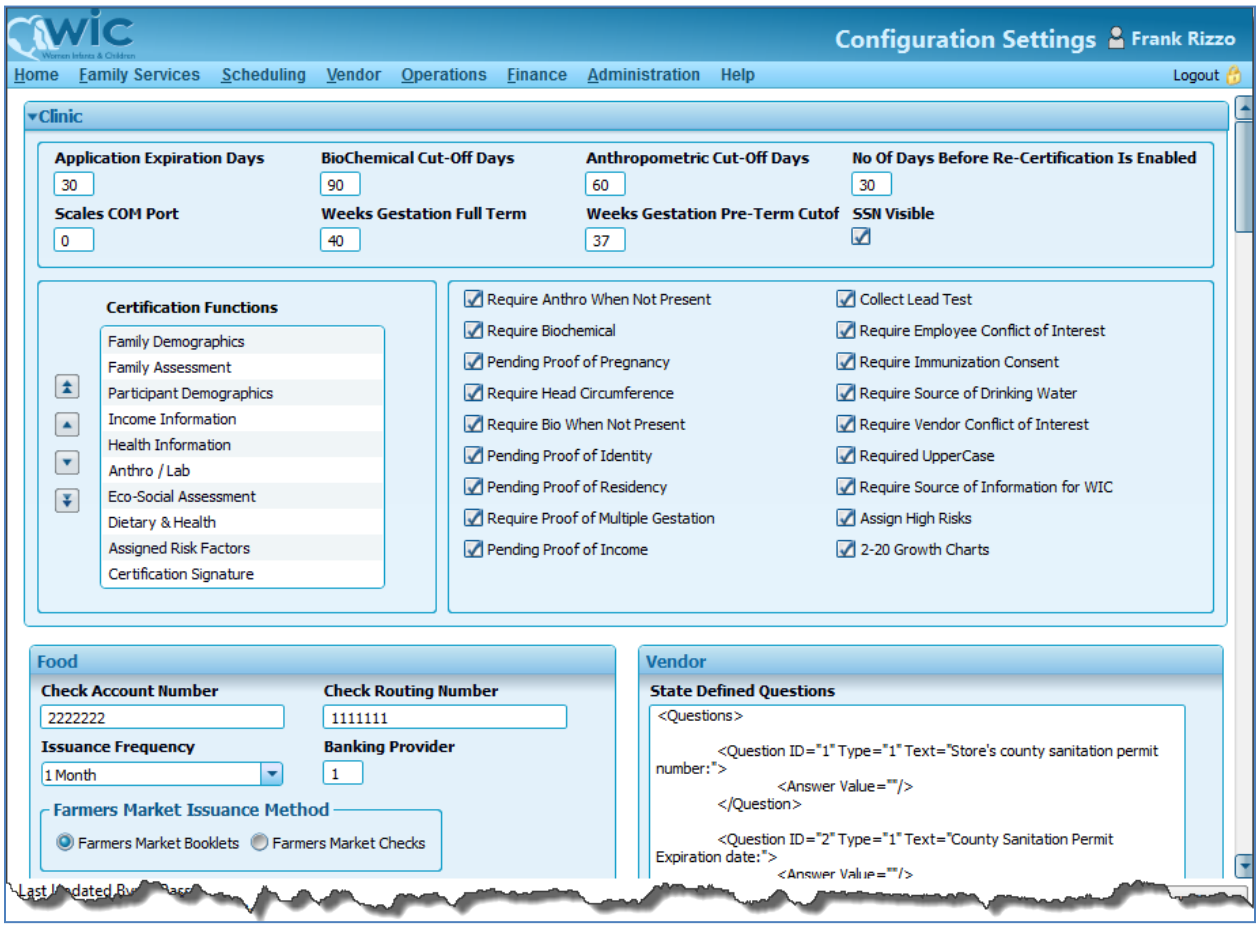



3. Click **Update** to save the configuration settings.

## Task E. Managing Finance Configuration Settings

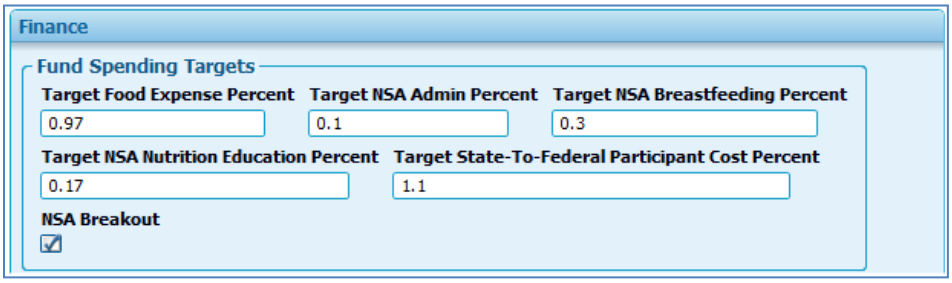
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.




2. Under Finance, Fund Spending Targets, manage the Finance module configuration settings as follows:
   - Enter or edit the **Target Food Expense Percent**.
   - Enter or edit the **Target NSA Admin Percent**.
   - Enter or edit the **Target NSA Breastfeeding Percent**.
   - Enter or edit the **Target NSA Nutrition Education Percent**.
   - Enter or edit the **Target State-To-Federal Participant Cost Percent**.
   - Check the box to indicate **NSA Breakout**.

This indicates whether NSA amounts are to be broken out or grouped together. If the box is checked, the amounts will be broken out.



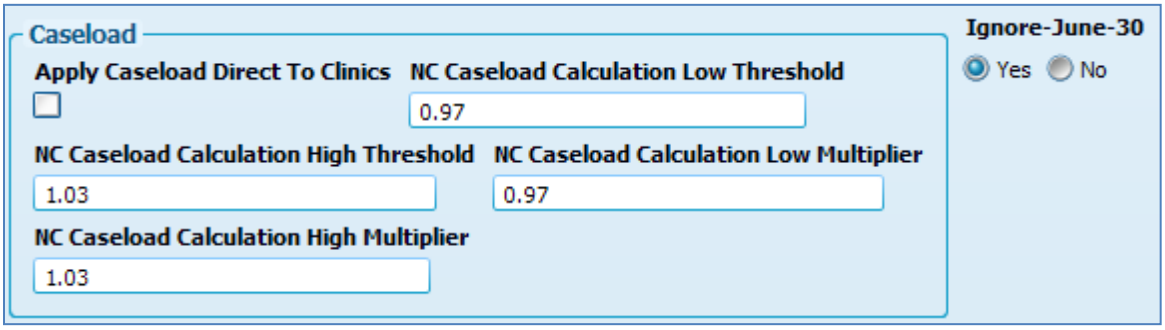

3. Under Caseload, manage additional configuration settings as follows:

   - Check the box to **Apply Caseload Direct to Clinics**.
   - Enter or edit the NC Caseload Calculation Low Threshold.
   - Enter or edit the NC Caseload Calculation High Threshold.
   - Enter or edit the NC Caseload Calculation Low Multiplier.
   - Enter or edit the NC Caseload Calculation High Multiplier.

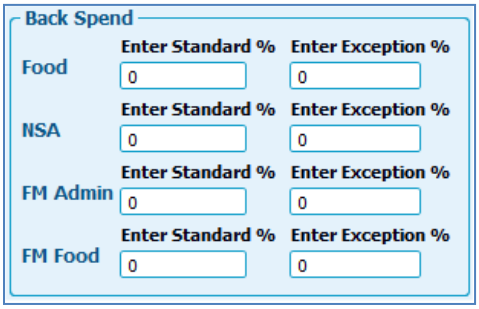
This indicates whether the caseload may be applied at the Clinic level.

   - Select the **Yes** or **No** option to **Ignore-June-30**.

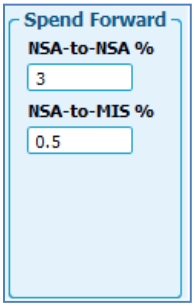
If Yes is selected, all transactions received from the State Finance system with an effective date of June 30 will be ignored by the Crossroads WIC system.



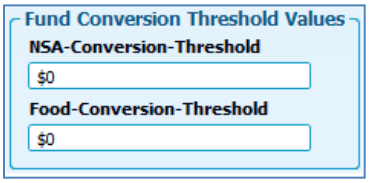
4. Under Back Spend, manage additional configuration settings as follows:
   - Edit or **Enter Standard %** for **Food**, **NSA**, **FM Admin**, and **FM Food**.
   - Edit or **Enter Exception %** for **Food**, **NSA**, **FM Admin**, and **FM Food**.




5. Under Spend Forward, manage additional configuration settings as follows:
   - Enter or edit the **NSA-to-NSA %**.
   - Enter or edit the **NSA-to-MIS %**.

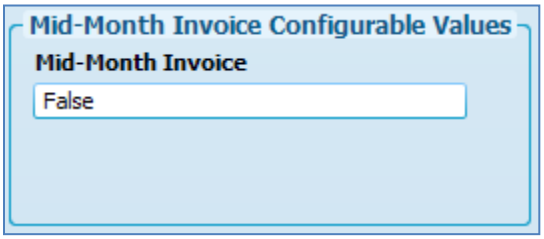



6. Under Fund Conversion Threshold Values, manage additional configuration settings as follows:
   - Enter or edit the **NSA-Conversion-Threshold**.
   - Enter or edit the **Food-Conversion-Threshold**.

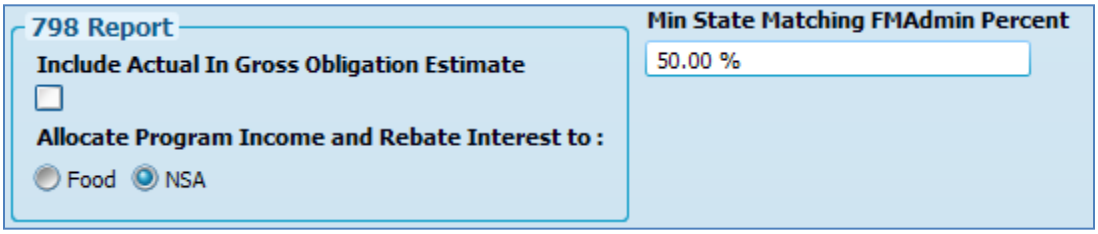



7. Under Mid-Month Invoice Configurable Values, manage additional configuration settings as follows:
   - Enter or edit the **Mid-Month Invoice**.

If the Mid-Month Invoice is True, the Rebate Invoice screen will allow a mid-month rebate invoice to be generated.




8. Under 798 Report, manage additional configuration settings as follows:
   - Check the box to **Include Actual In Gross Obligation Estimate**.
   - Under Allocate Program Income and Rebate Interest to:, indicate **Food** or **NSA**.
   - Enter or edit the Min State Matching FMAdmin Percent.



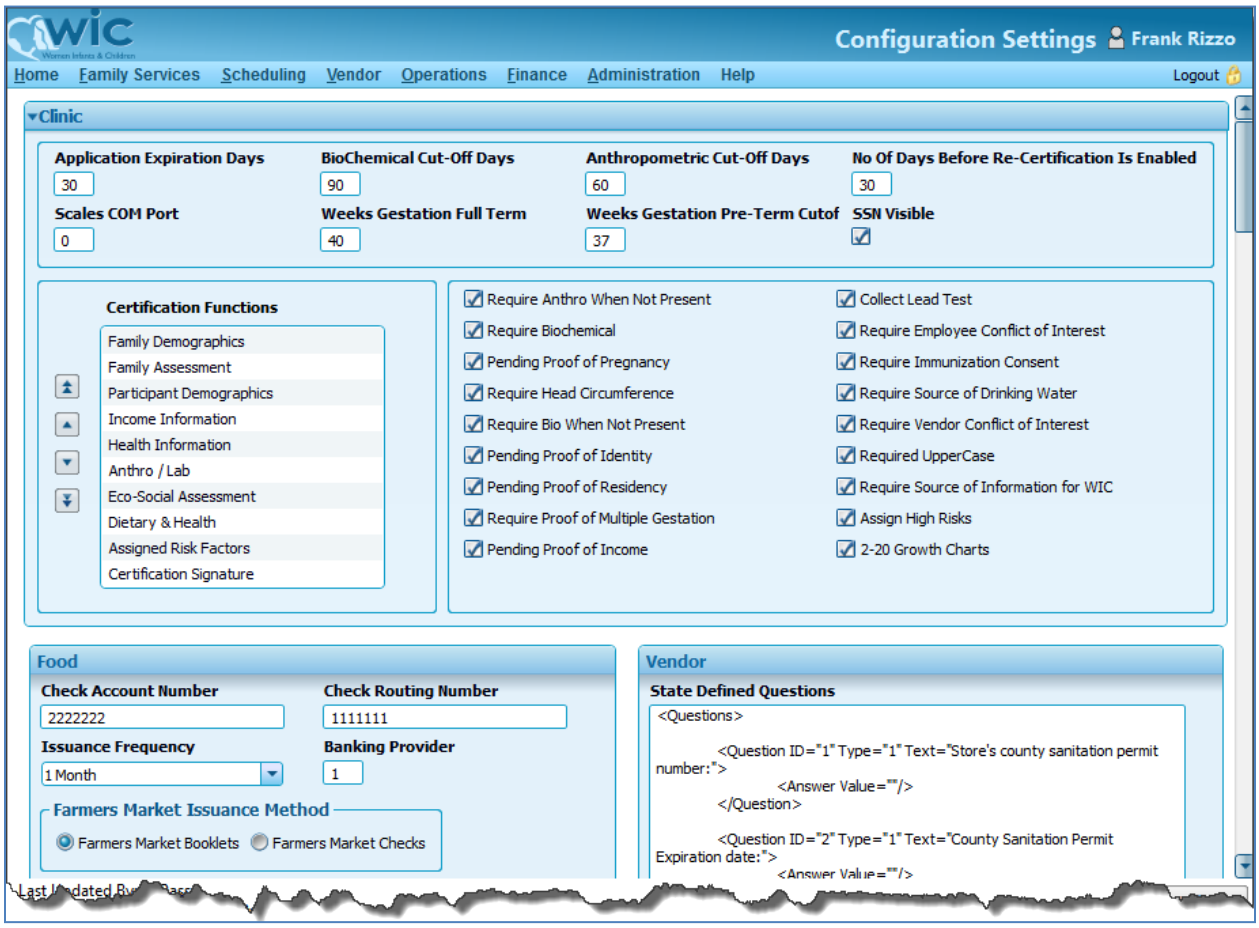

If this box is selected, actual food dollars spent are reported. If this box is not selected, estimated food obligations are reported.

9. Click **Update** to save the configuration settings.

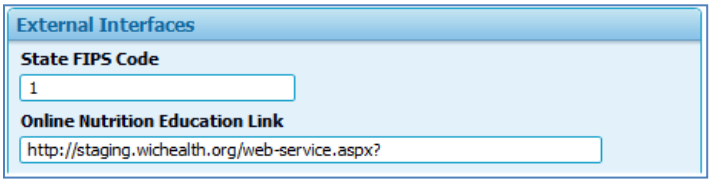
## Task F. Managing External Interfaces Configuration Settings

Complete the following steps to perform this task:

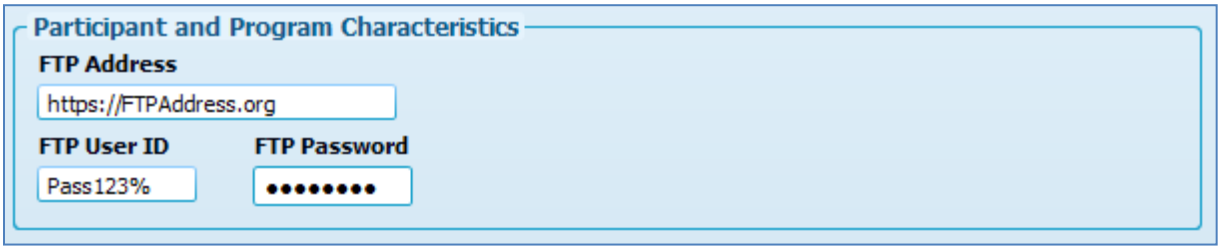
1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.



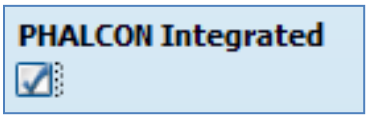

2. Under External Interfaces, manage the configuration settings for external interfaces as follows:
   - Enter or edit the **State FIPS Code**.
   - Enter or edit the **Online Nutrition Education Link**.



3. Under External Interfaces, Participant and Program Characteristics, manage the configuration settings for external interfaces as follows:
   - Enter or edit the **FTP Address**.
   - Enter or edit the **FTP User ID**.
   - Enter or edit the **FTP Password**.




4. Check the box to indicate Phalcon Intergrated.

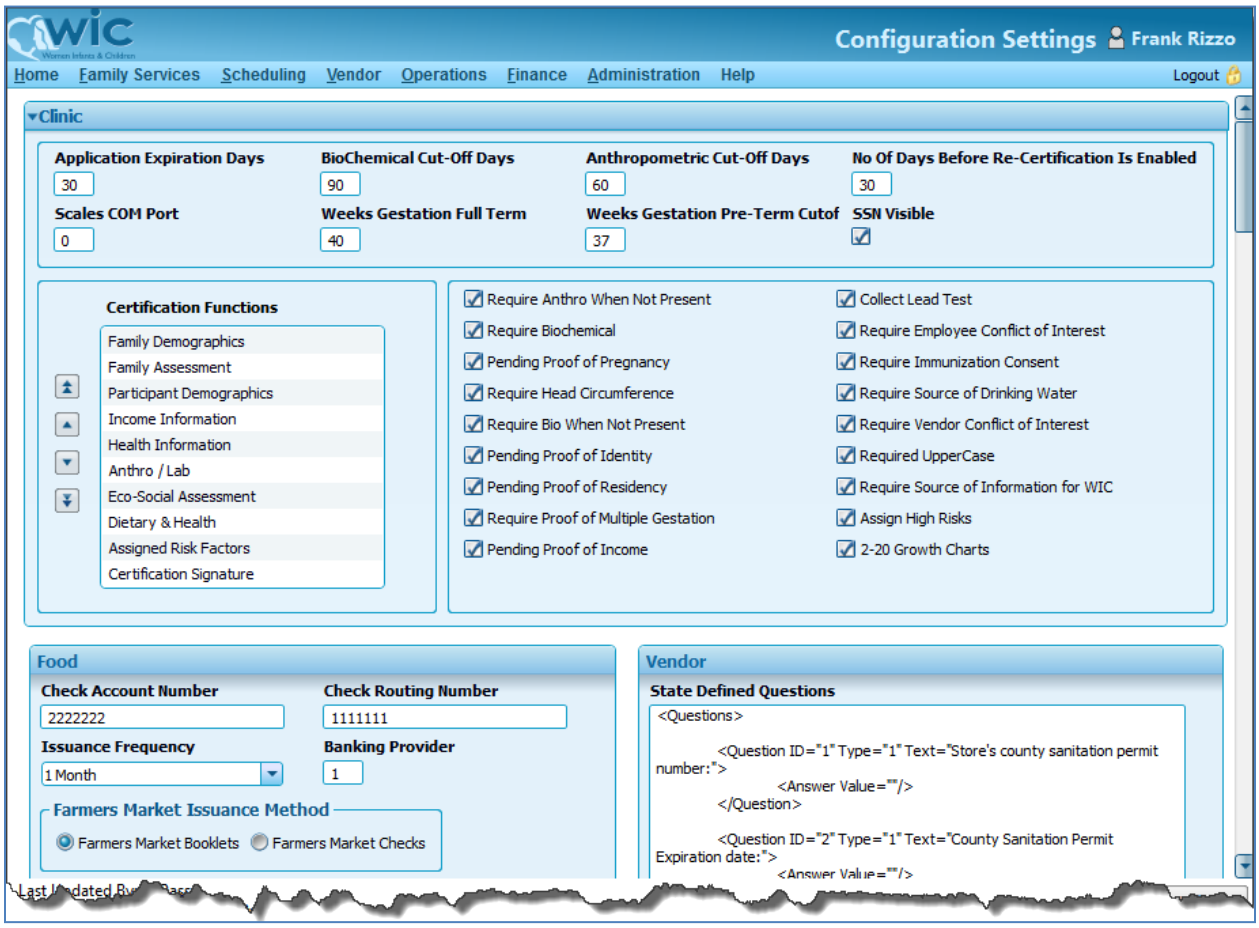



5. Click **Update** to save the configuration settings.

## Task G. Managing Communication Configuration Settings

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.




2. Under State-Level Communication Settings, AutoDialer Communication Settings, manage the communication configuration settings as follows:

   - Enter or edit the **Days In Advance**.

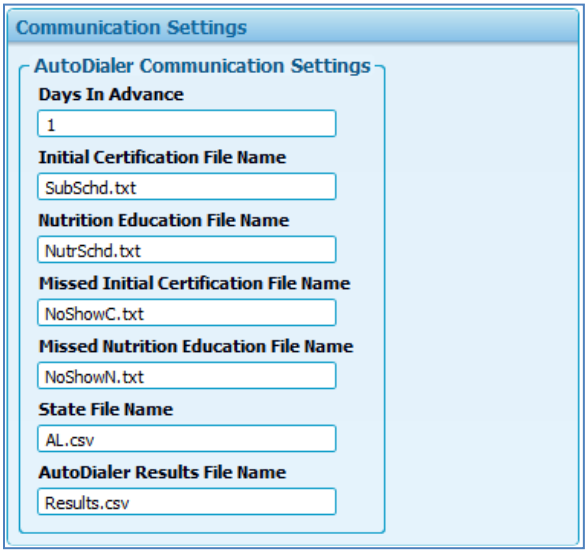
| | |
|---|---|
| | This is the number of days prior to an appointment that reminder calls will be placed. |

- Enter or edit the **Initial Certification File Name**.
- Enter or edit the **Nutrition Education File Name**.
- Enter or edit the **Missed Initial Certification File Name**.
- Enter or edit the **Missed Nutrition Education File Name**.
- Enter or edit the **State File Name**.

These are the names of the files sent from the Crossroads WIC system to the AutoDialer system containing auto-call information for various appointments.

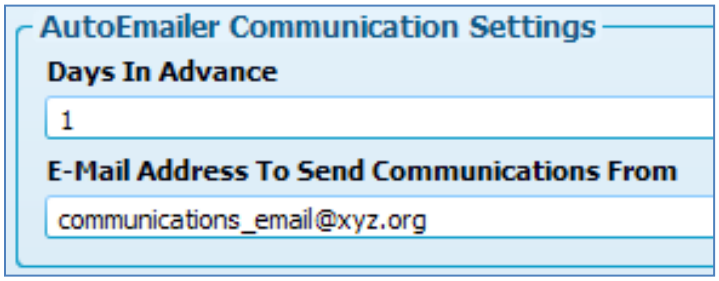
- Enter or edit the **AutoDialer Results File Name**.

This is the name of the file sent from the AutoDialer system to the Crossroads WIC system containing result information for all calls.

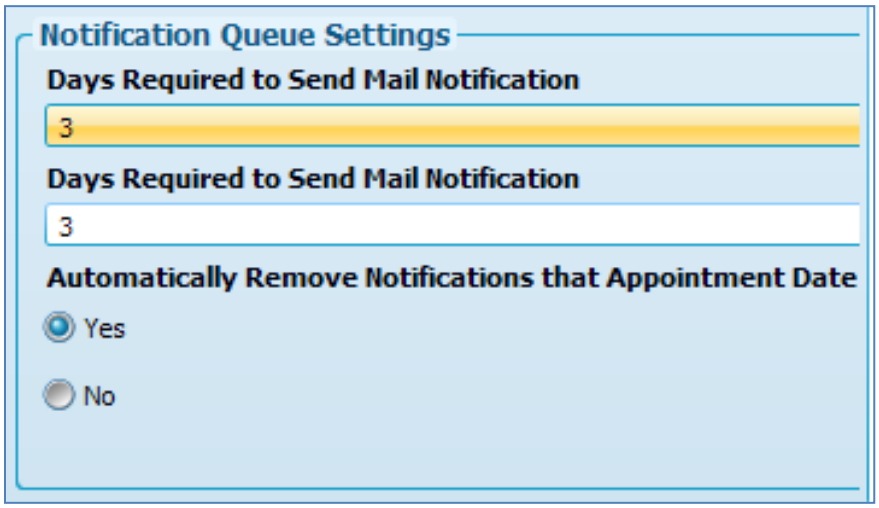



3. Under State-Level Communication Settings, AutoEmailer Communication Settings, manage the communication configuration settings as follows:

- Enter or edit the **Days In Advance**.
- Enter or edit the E-Mail Address to Send Communication From



4. Under State-Level Communication Settings, Notification Queue Settings, manage the communication configuration settings as follows:
   - Enter or edit the **Days Required to Send Mail Notifications**.
   - Enter or edit the **Automatically Remove Notifications that Appointment Date Has Passed.**

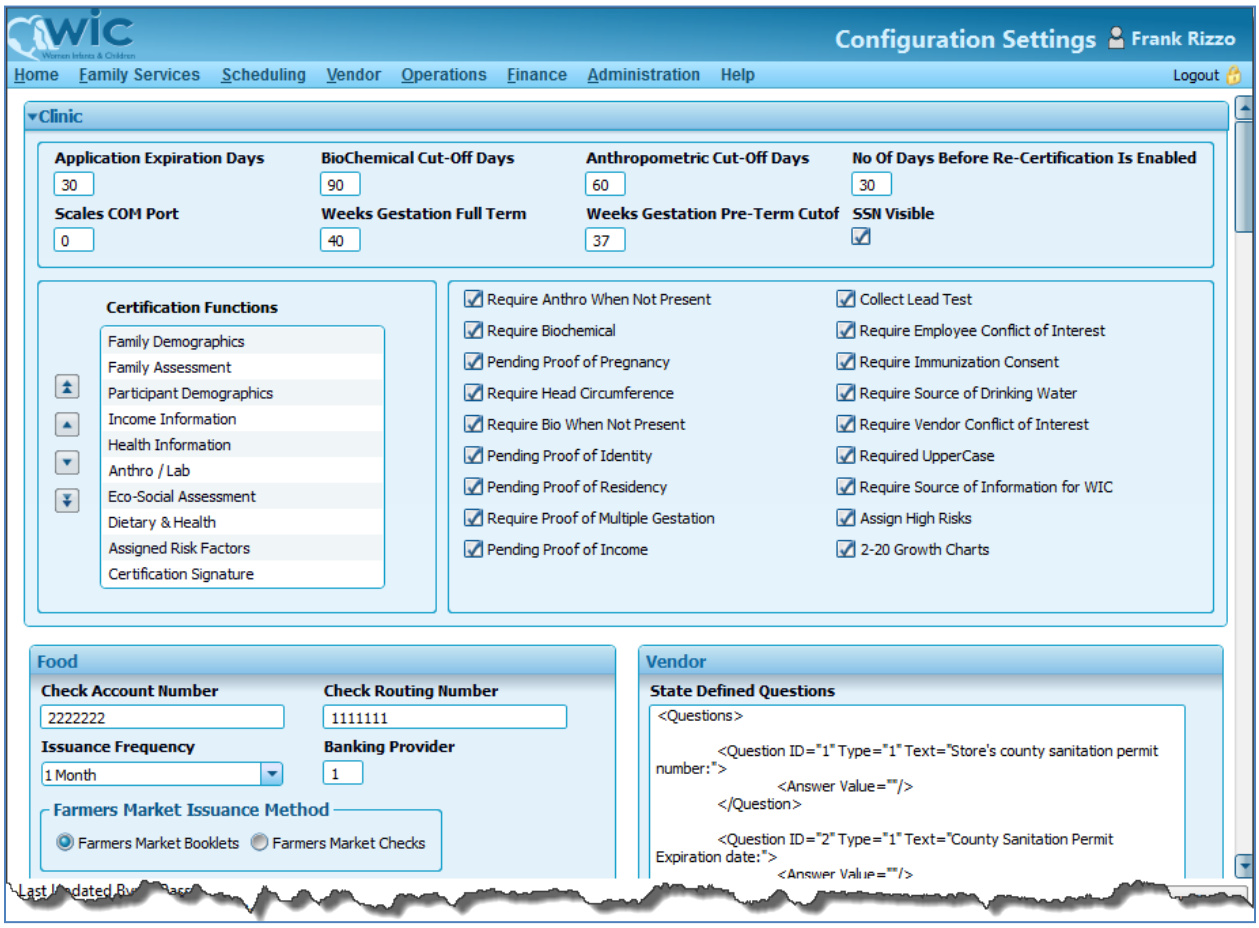



5. Click **Update** to save the configuration settings.

## Task H. Managing Operations Configuration Settings

Complete the following steps to perform this task:

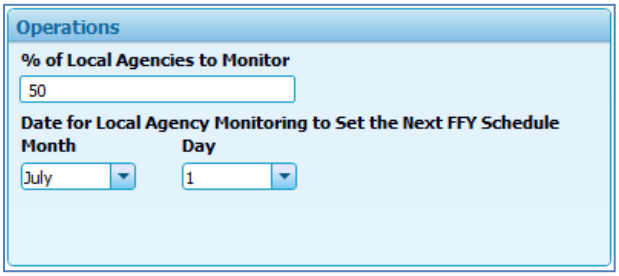
1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.




2. Under Operations, manage the Operations module configuration settings as follows:
   - Enter or edit the **% of Local Agencies to Monitor**.

| | |
|---|---|
| | This indicates the percentage of Local Agencies to schedule for on-site visits each year. |

- Enter or select the **Month** and **Day** for the **Date for Local Agency Monitoring to Set the Next FFY Schedule**.

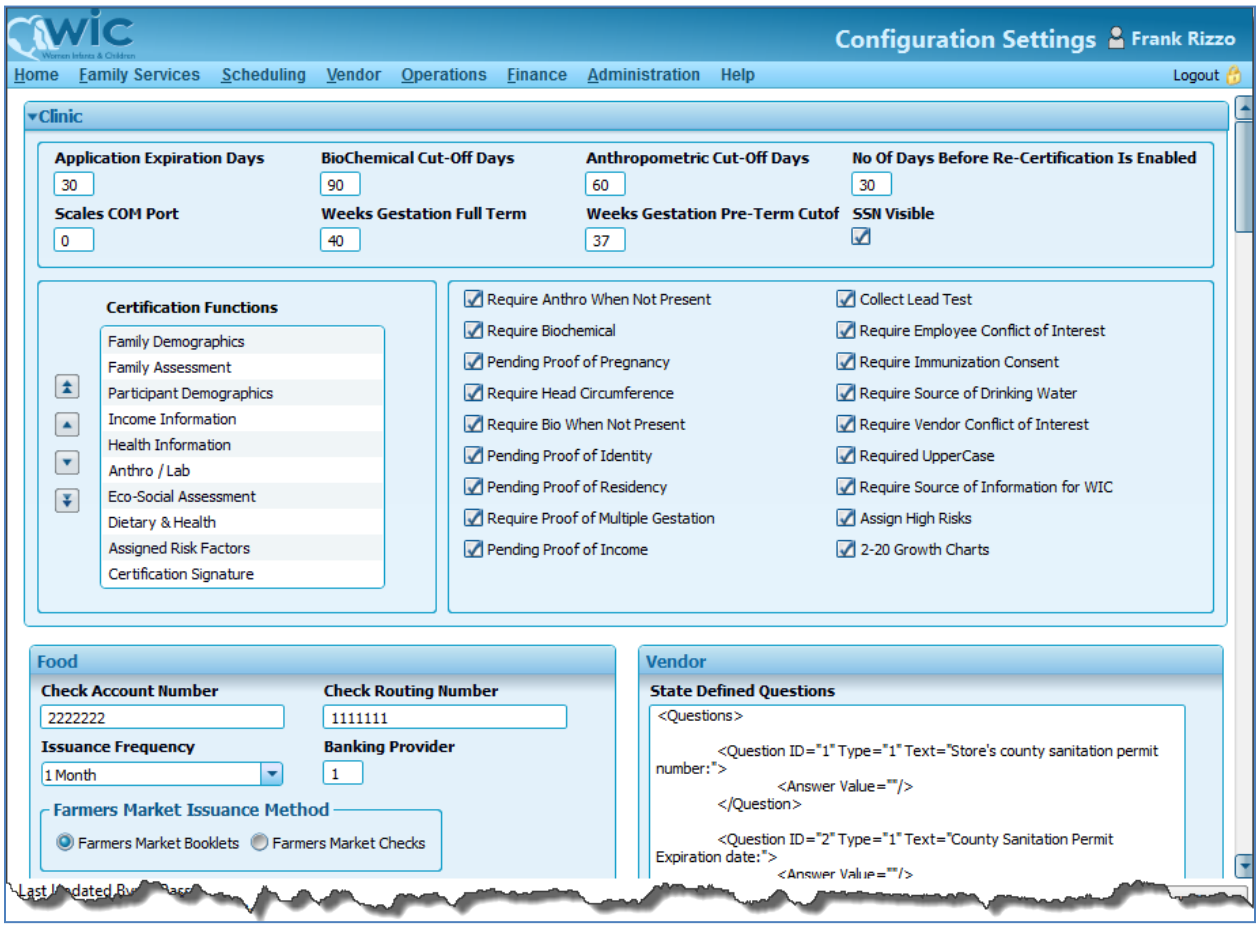



3. Click **Update** to save the configuration settings.

## Task I. Managing Security Configuration Settings

Complete the following steps to perform this task:

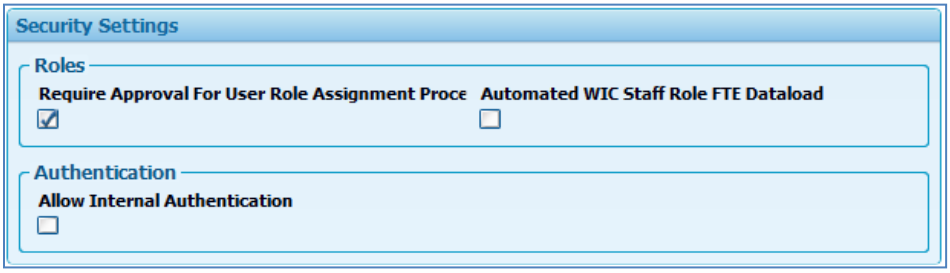
1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.




2. Under Security Settings, manage the configuration settings as follows:
   - Under Roles, check the box to **Require Approval For User Role Assignment Process**.

If this box is checked, the Role Approval screen will be used to approve or deny user role assignments.

- Under Roles, check the box to indicate **Automated WIC Staff Role FTE Dataload**.
- Under Authentication, check the box to **Allow Internal Authentication**.

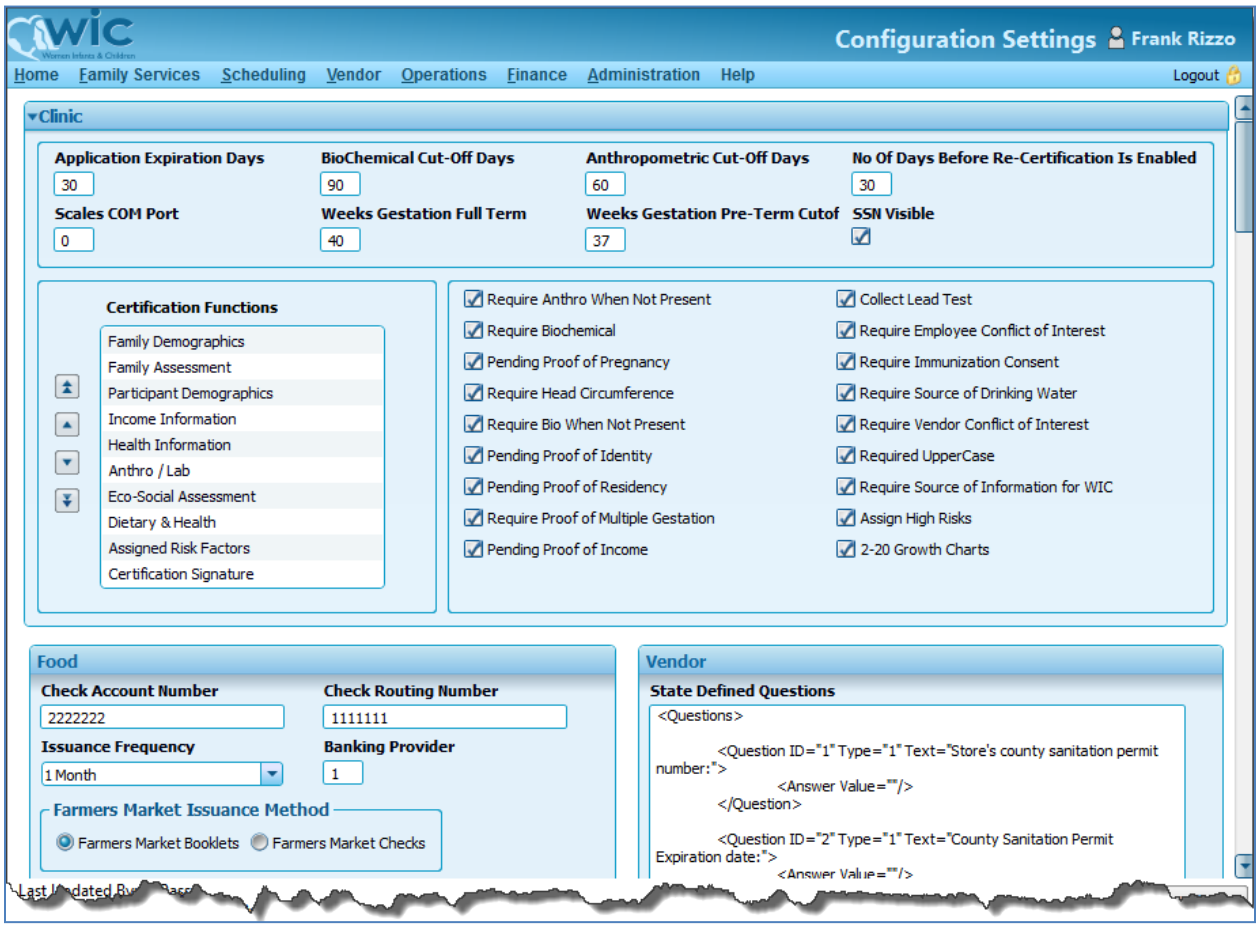



3. Click **Update** to save the configuration settings.

## Task J. Managing EBT State Configuration Settings

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.



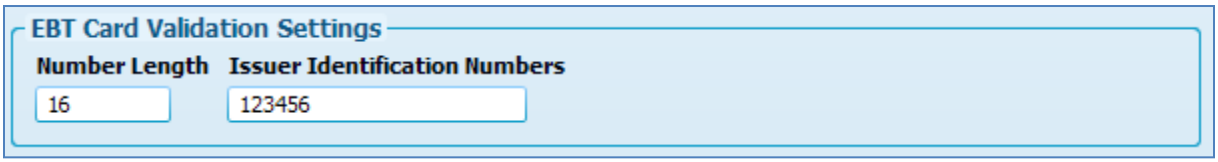

2. Under EBT State Settings, manage the EBT configuration settings as follows:
   - Check the box for **Is EBT Enabled**.

| | |
|---|---|
| | Checking this box indicates that a state has EBT set up for use. |

- Enter or edit the **Max Requested Count for Purchases**.
- Enter or edit the **Max Requested Count for EBT Card Details**.

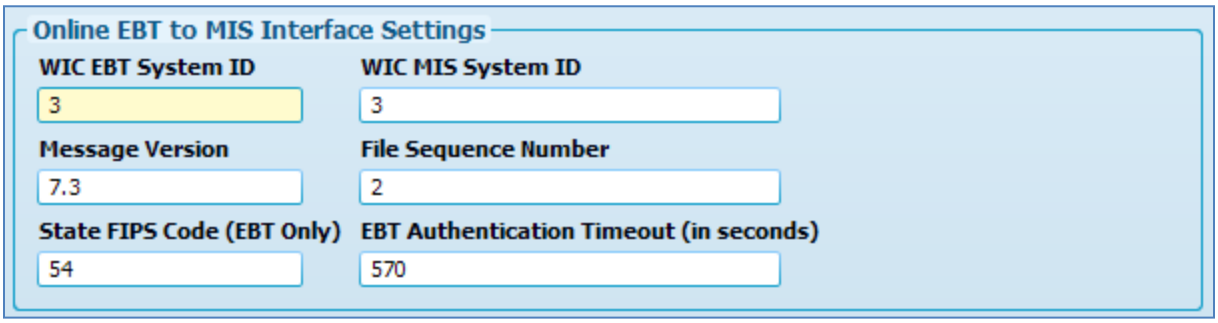
3. Under EBT Card Validation Settings, manage additional EBT configuration settings as follows:

   - Enter of edit the EBT card Number Length.
   - Enter of edit the Issuer Identification Numbers.




4. Under Online EBT to MIS Interface Settings, manage additional EBT configuration settings as follows:

   - Enter or edit the **WIC EBT System ID**.
   - Enter or edit the **WIC MIS System ID**.
   - Enter or edit the **Message Version**.
   - Enter or edit the **File Sequence Number**.
   - Enter or edit the **State FIPS Code (EBT Only).**
   - Enter or edit the **EBT Authentication Timeout (in seconds)**.

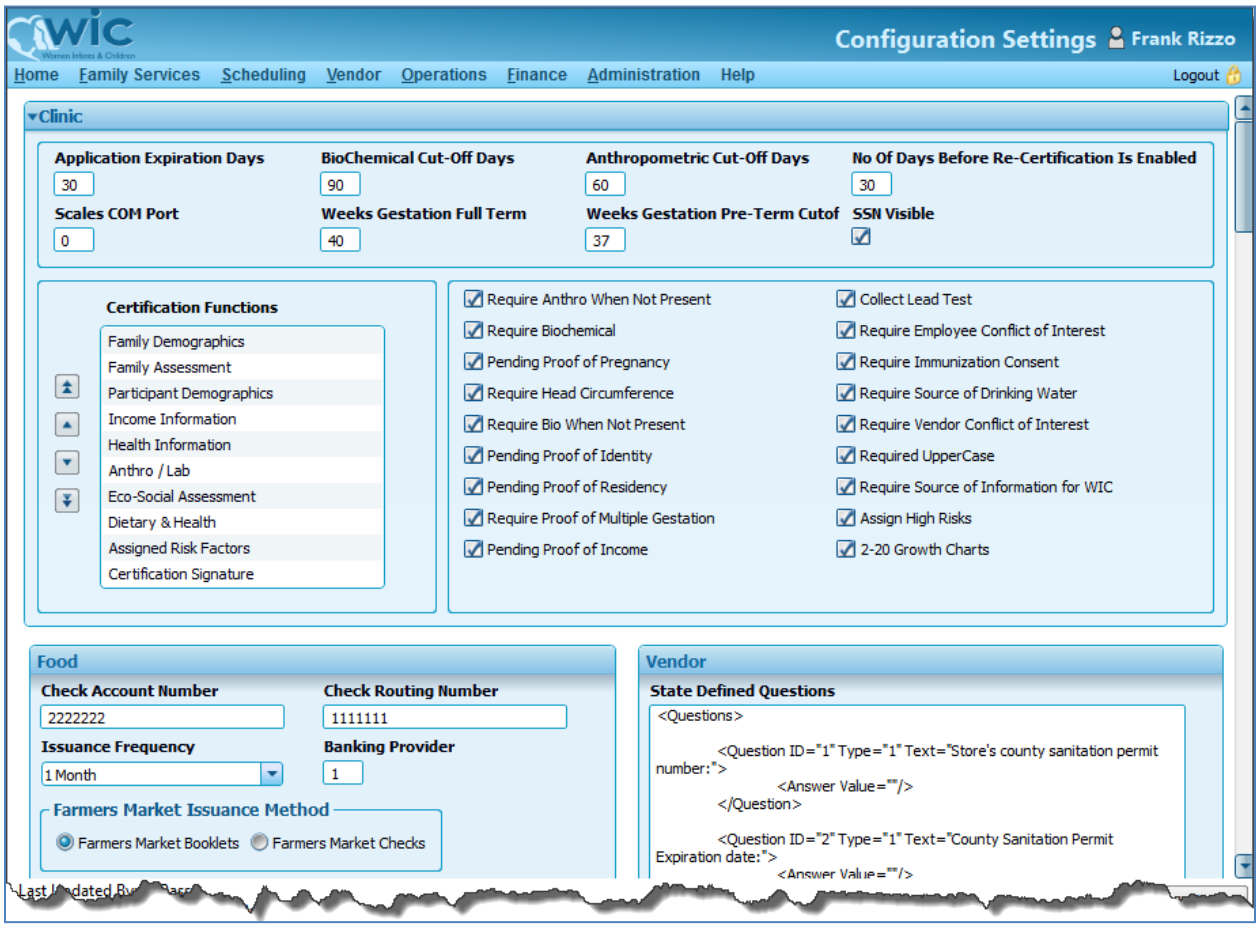



5. Click **Update** to save the configuration settings.

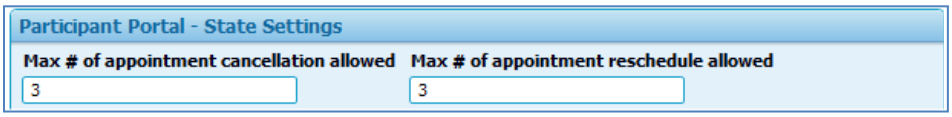
## Task K. Managing Participant Portal State Configuration Settings

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.




2. Under Participant Portal – State Settings, manage the portal configuration settings as follows:
   - Enter or edit the **Max # of Appointment Cancellation Allowed**.
   - Enter or edit the **Max # of Appointment Reschedule Allowed**.

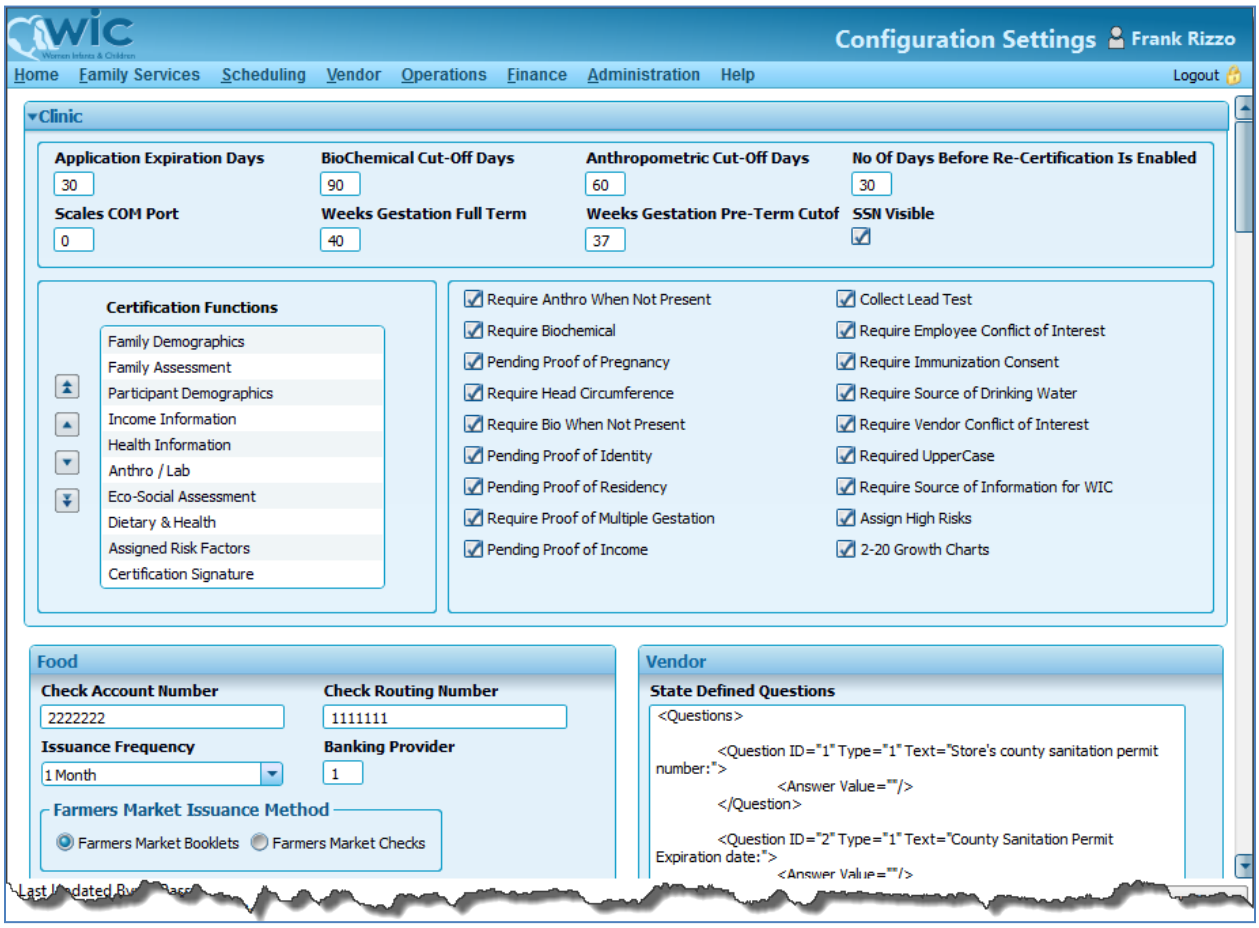



3. Click **Update** to save the configuration settings.

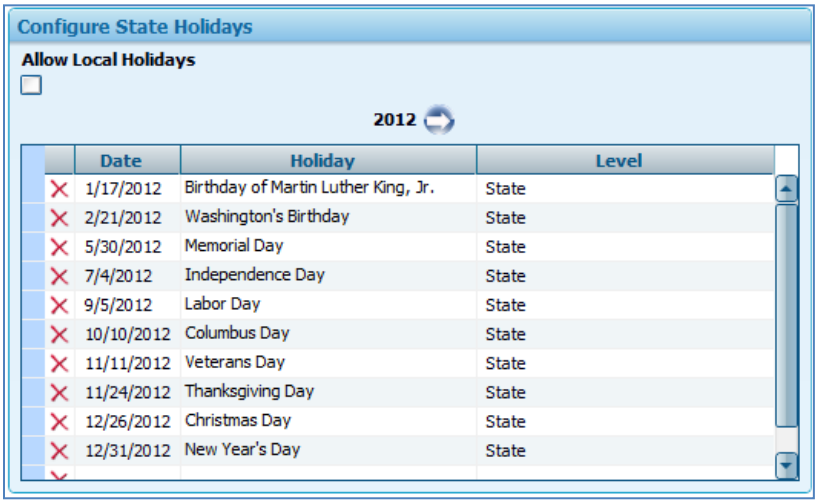
## Task L. Managing State Holiday Configuration Settings

Complete the following steps to perform this task:

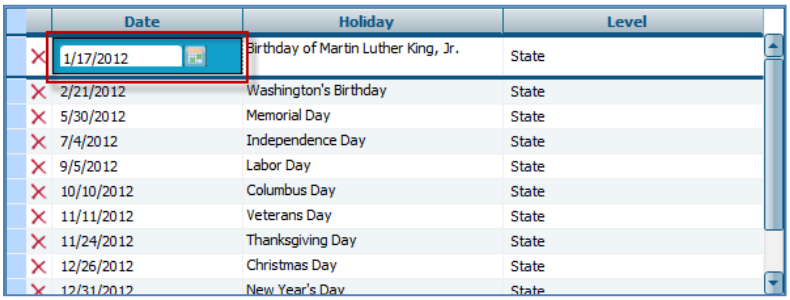
1. From the Home screen, go to **Administration à Configuration à Manage System Settings**. The Configuration Settings screen displays.



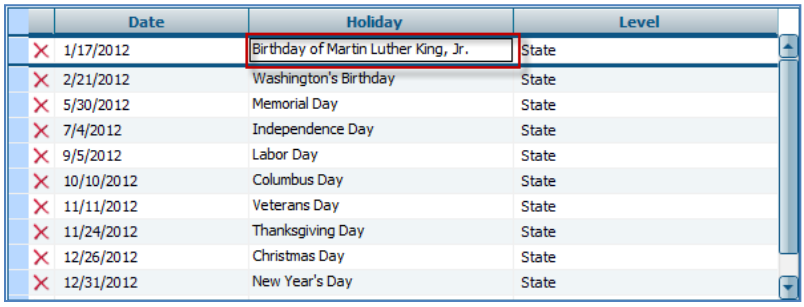
2. Under Configure State Holidays, manage the holiday configuration settings as follows:
   - Check the box to **Allow Local Holidays**.
   - Click the arrow to display the next calendar year.




   - Under **Date**, click to enter or select a new date.

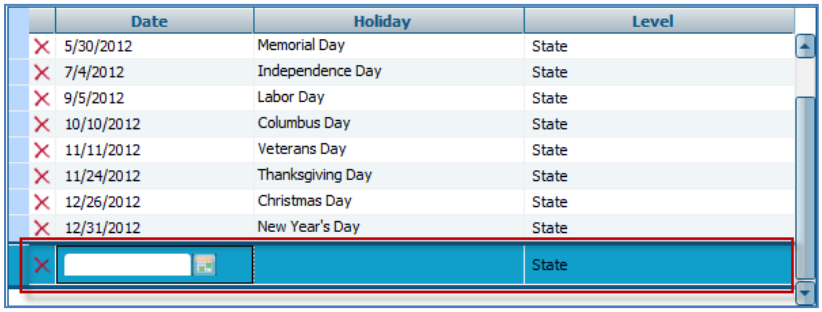



   - Under **Holiday**, click to enter or edit the holiday name.



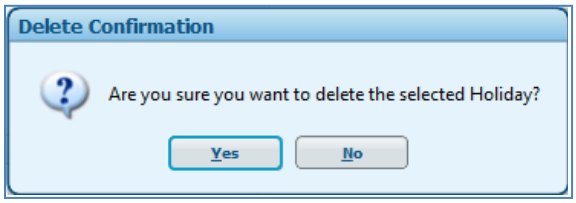

The Level cannot be modified.

3. Click the blank row at the bottom of the grid to add a new holiday, then enter the details as follows:
   - Enter or select the **Date**.
   - Enter the **Holiday**.




The Level automatically defaults to State.

4. Click the delete icon ✕ to delete a holiday. A confirmation screen displays.




5. Click **Yes**. The holiday will be removed from the grid.

If a new holiday has been entered in one of the blank lines at the bottom of the grid, it cannot be deleted until it has been given both a Date and Holiday name.

6. Click **Update** to save the configuration settings.

## Congratulations!

You have successfully managed Clinic, Food, Vendor, Appointment, Finance, External Interfaces, Communication Settings, Operations, Security Settings, EBT State Settings, Participant Portal – State Settings, and State Holiday configuration settings.

# CONFIGURATION

## Adding, Editing, and Deleting News Items

### Overview

The Maintain News Items screen allows you to add news items (such as announcements or links to external articles) to the News section on the Crossroads Home screen.

This process includes the following tasks:

Task A. Adding News Items

Task B. Modifying News Items

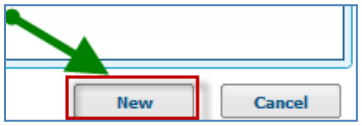
Task C. Deleting News Items

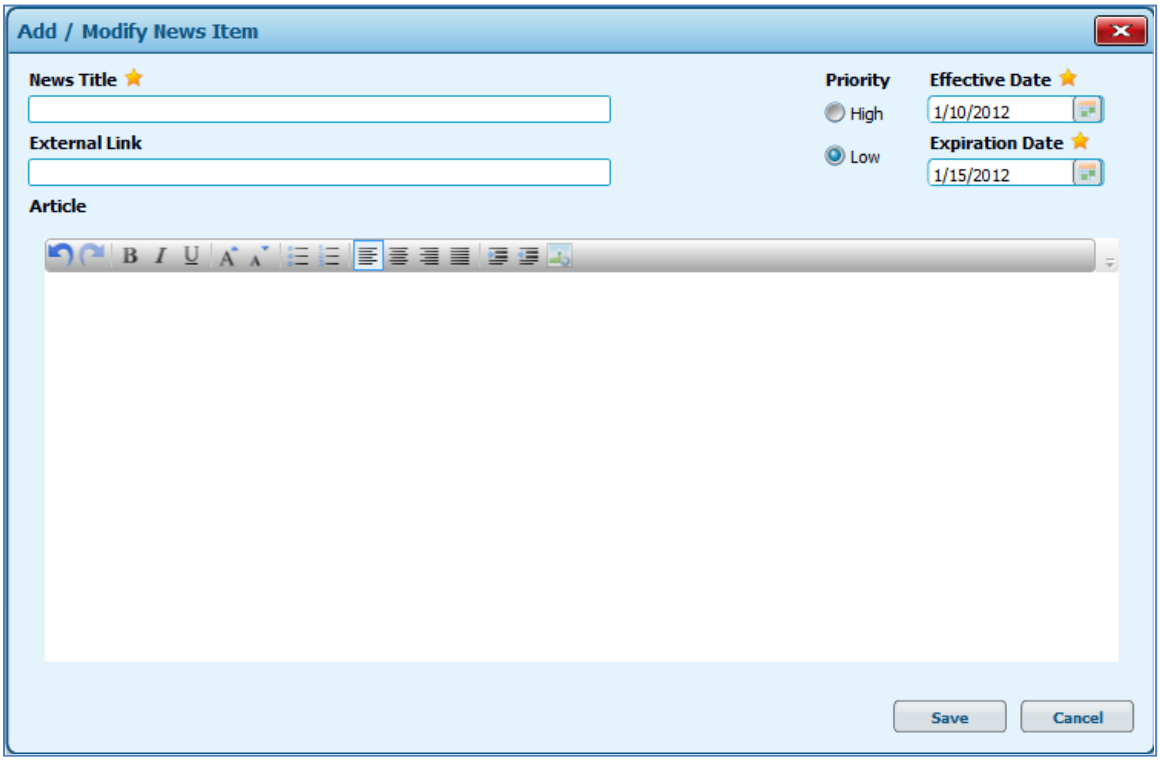
## Task A. Adding News Items

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Maintain News Items**. The Maintain News Items screen displays.

2. Click **New**. The Add/Modify News Item screen displays.



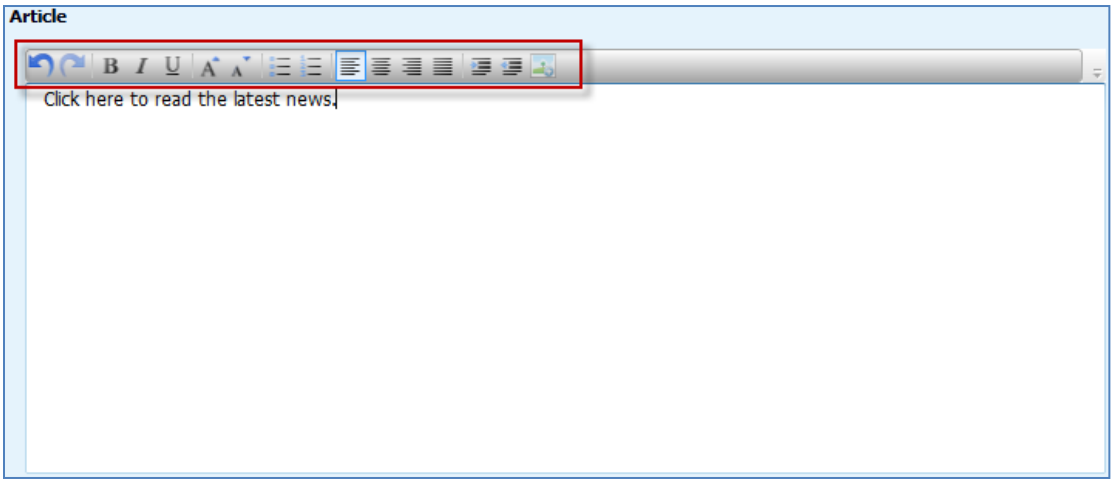
3. Enter the **News Title**.

> The News Title is the link displayed for users in the News section of the Home screen.

4. Enter the **External Link**, if needed.

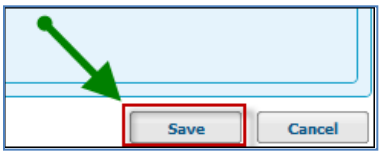
> The External Link must be entered in the following format: http://www.website.com.

5. Indicate the **Priority** of **High** or **Low**.
6. Enter or select the **Effective Date**.
7. Enter or select the **Expiration Date**.
8. Under Article, enter the text of the news item.




> Use the toolbar functions to format the news item text. You can apply styles (bold, italics, underline), increase or decrease the font size, add bullets or numbering, etc.
>
> If there is no External Link, the Article text will be displayed for users when they click the News Title in the News section of the Home screen.
>
> If there is an External Link, the Article text will not be displayed.

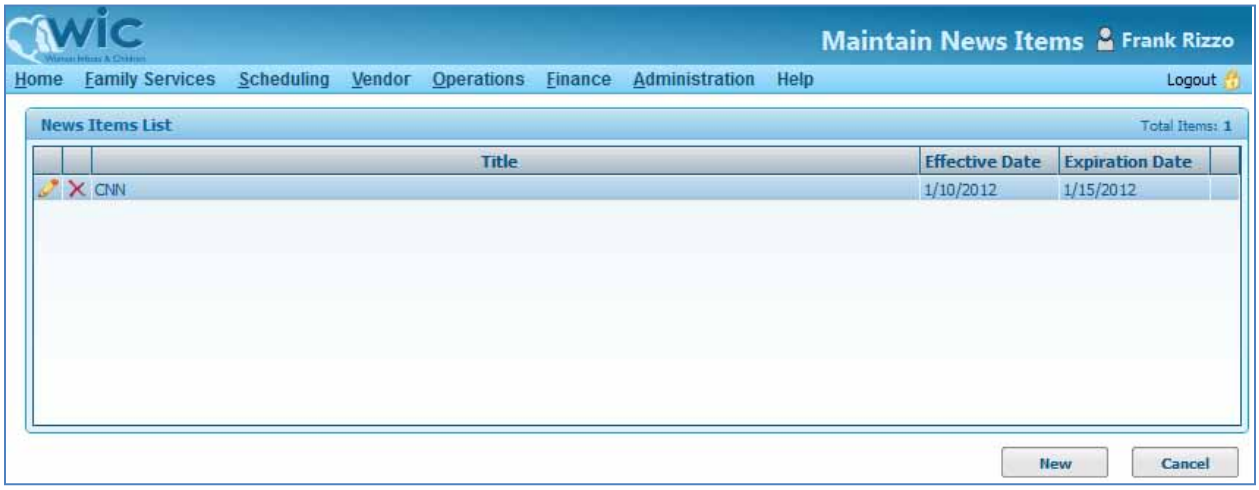
9. Click **Save** to save your changes. A status message displays.



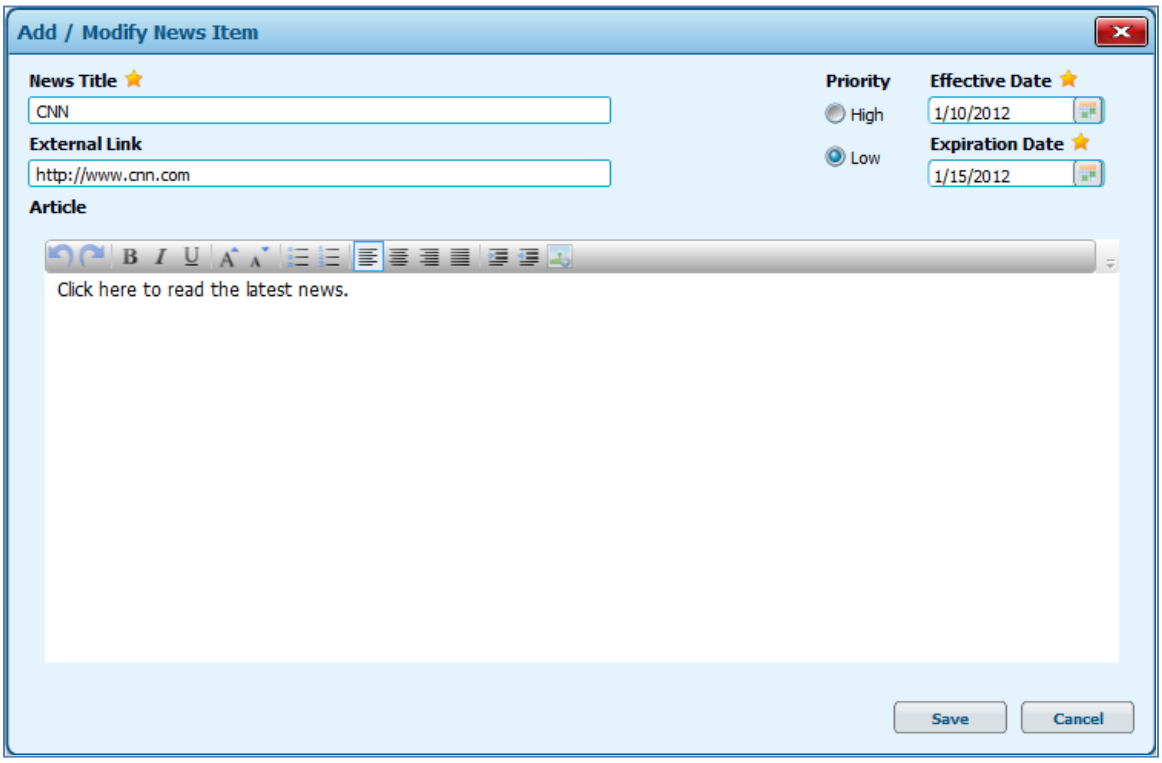
## Task B. Modifying News Items

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Maintain News Items**. The Maintain News Items screen displays.




2. Under News Items List, click the pencil icon . The Add/Modify News Item screen displays.



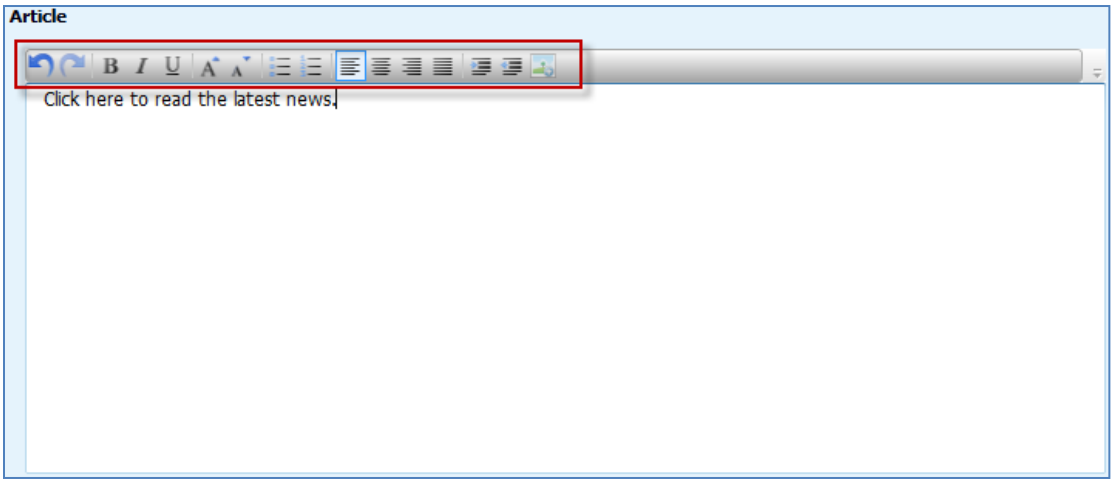
3. Edit the **News Title**, as needed.

> The News Title is the link displayed for users in the News section of the Home screen.

4. Enter or edit the **External Link**, if needed.

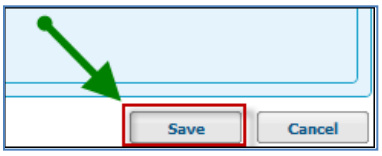
> The External Link must be entered in the following format: http://www.website.com.

5. Indicate the **Priority** of **High** or **Low**.
6. Select or edit the **Effective Date**.
7. Select or edit the **Expiration Date**.
8. Under Article, enter or edit the text of the news item.




> Use the toolbar functions to format the news item text. You can apply styles (bold, italics, underline), increase or decrease the font size, add bullets or numbering, etc.
>
> If there is no External Link, the Article text will be displayed for users when they click the News Title in the News section of the Home screen.
>
> If there is an External Link, the Article text will not be displayed.

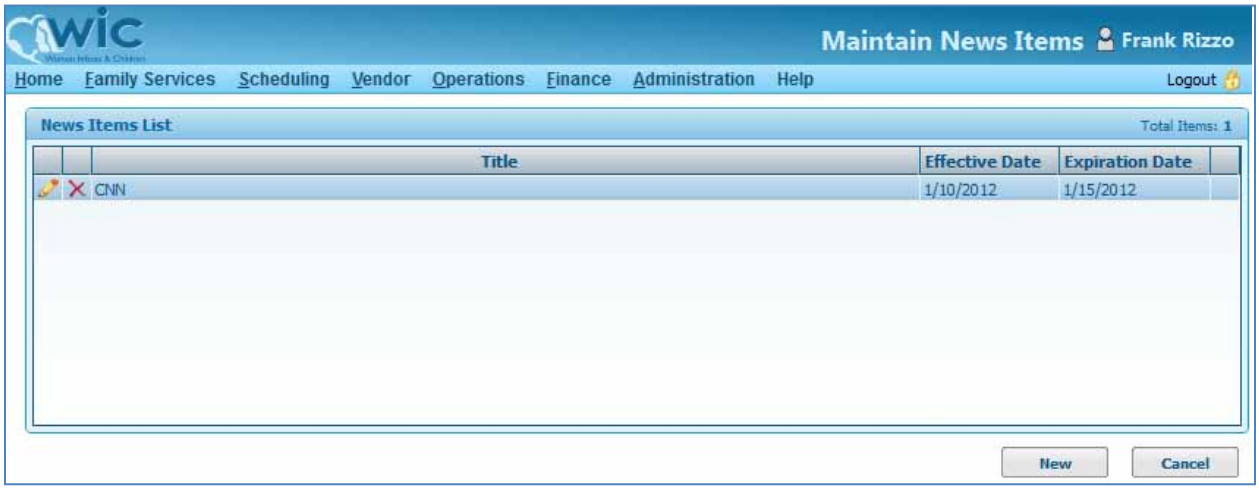
9. Click **Save** to save your changes. A status message displays.



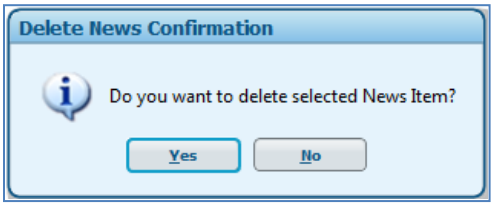
## Task C. Deleting News Items

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Maintain News Items**. The Maintain News Items screen displays.




2. Under News Items List, click the delete icon . The Delete News Confirmation screen displays.




3. Click **Yes**. A status message displays and the news item is removed from the screen.

## Congratulations!

You have successfully added new news items, viewed and editing existing news items, and deleted news items.

# CONFIGURATION

## Viewing, Restarting, and Configuring Background Processes

### Overview

The System Process Overview screen acts as a dashboard, providing a visual summary of various system processes. This includes the Redemption, Finance, EBT, Reporting, Vendor End of Day, Clinic End of Day, and Security End of Day batch processes.

This process includes the following tasks:

Task A. Viewing System Process Summaries

Task B. Restarting Batch Processes

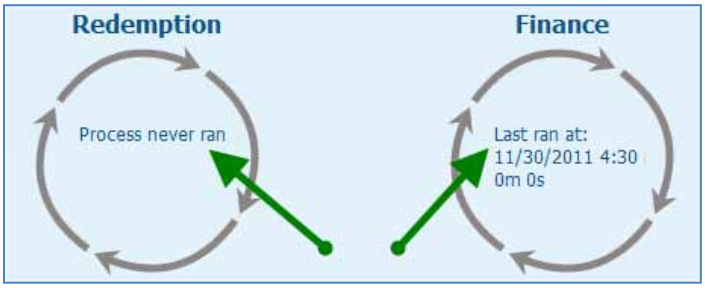
Task C. Configuring External Batch Processes

## Task A. Viewing System Process Summaries

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Configuration à Manage Background Processes**. The System Process Overview screen displays.

2. View the most recent run date for each process inside the interactive images.



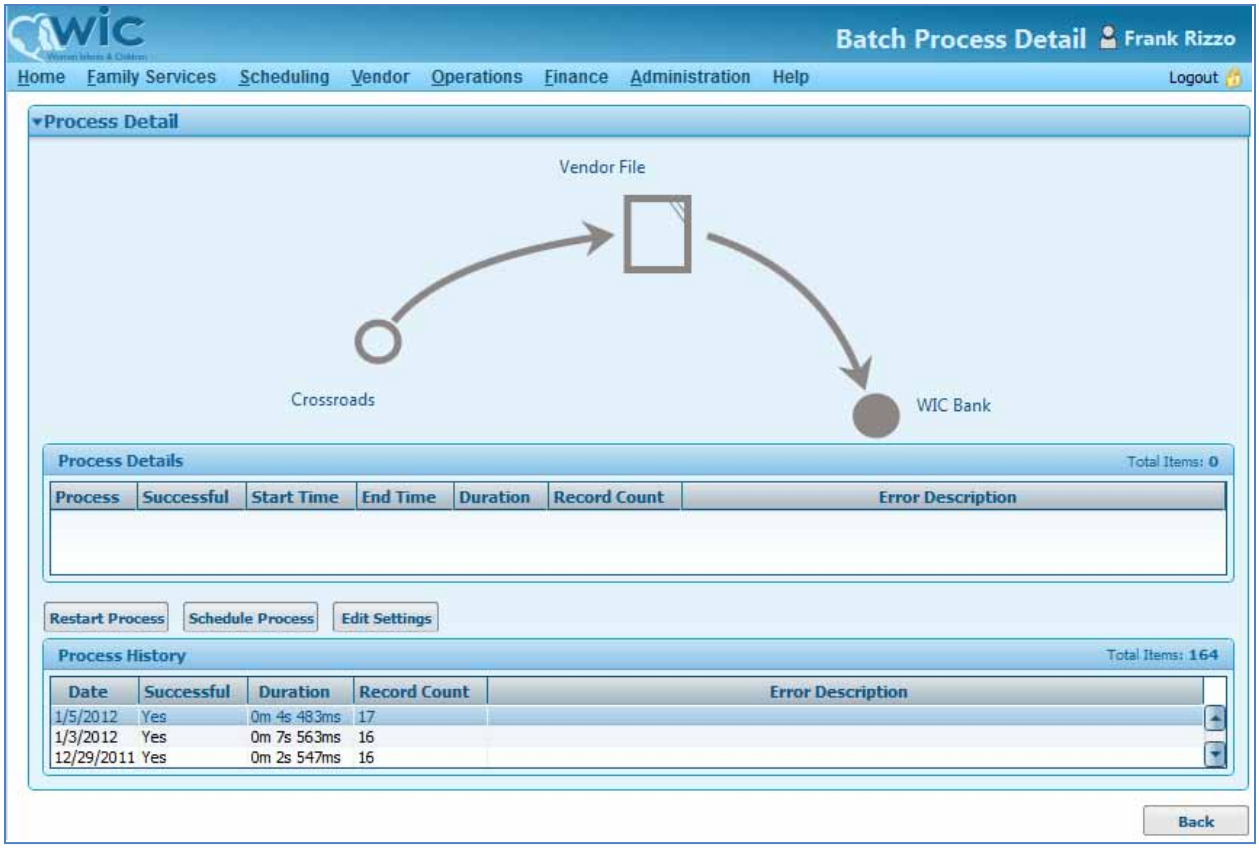

If a process has not yet been run, "Process never ran" will be displayed inside the interactive image.

3. Click an interactive image to display a visual representation of the process flow.

For example, click the **Redemption** image to display the Redemption Process Flow screen. The Process Flow screen graphically represents the automatic processes that run as a part of a system module. The circular arrows represent calculation processes that execute daily. The arrowed lines represent batch files transmitted between Crossroads and external financial partners.

The overall status of a process flow is represented by the color of the diagram. Green indicates that the process flow executed successfully. Red indicates an error in processing. Gray indicates that the process has not yet run.

4. On the Process Flow screen, click any of the interactive images. The Batch Process Detail screen displays.




A visual representation of the process flow displays under Process Detail.

The Process Details grid displays the name of each process, whether the run was successful, the start and end times, duration, record count, and error description.

The Process History grid displays the date of each process, whether the run was successful, the duration, record count, and error description.

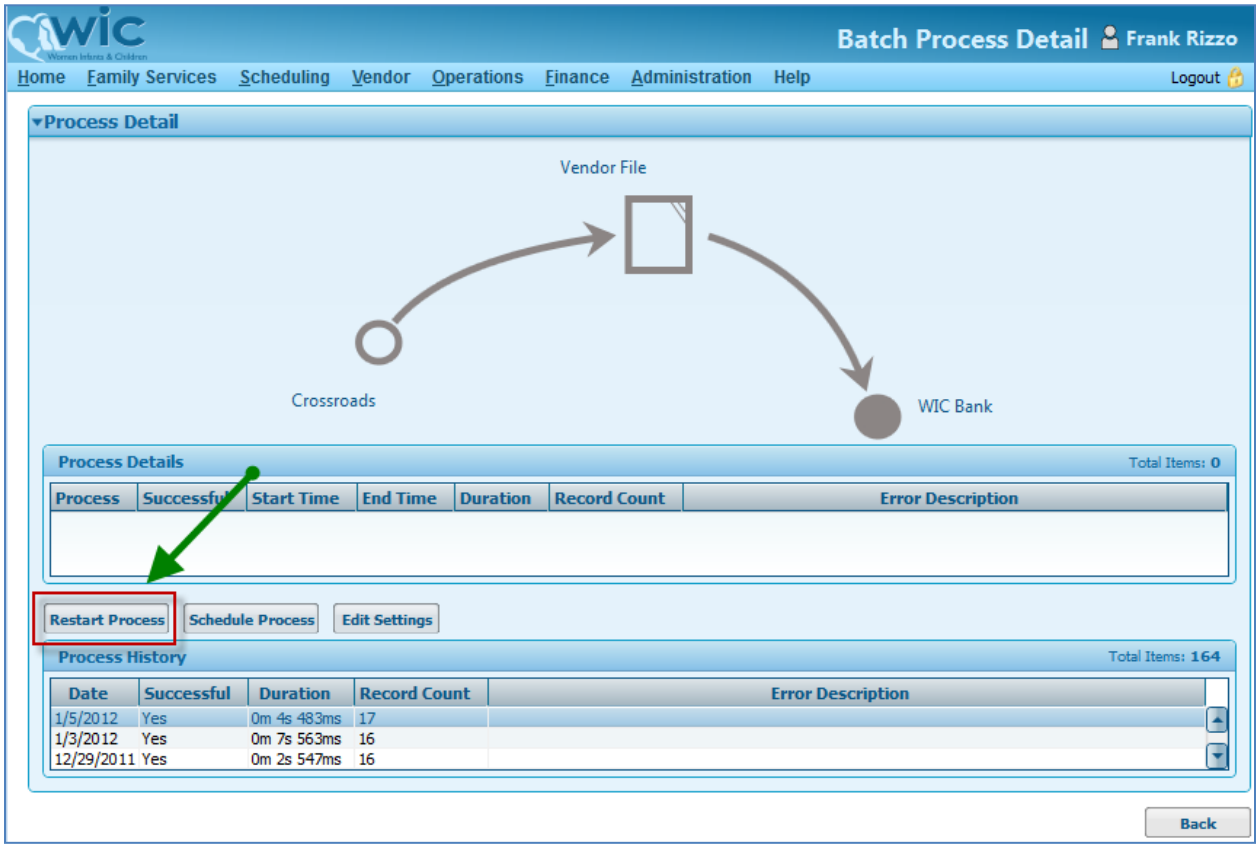
5. Click **Back**. The Process Flow screen displays.

6. Click **Back** again. The System Process Overview screen displays.

### Task B. Restarting Batch Processes

Complete the following steps to perform this task:

1. Access the Batch Process Detail screen. (For details, refer to Task A of the current scenario.)

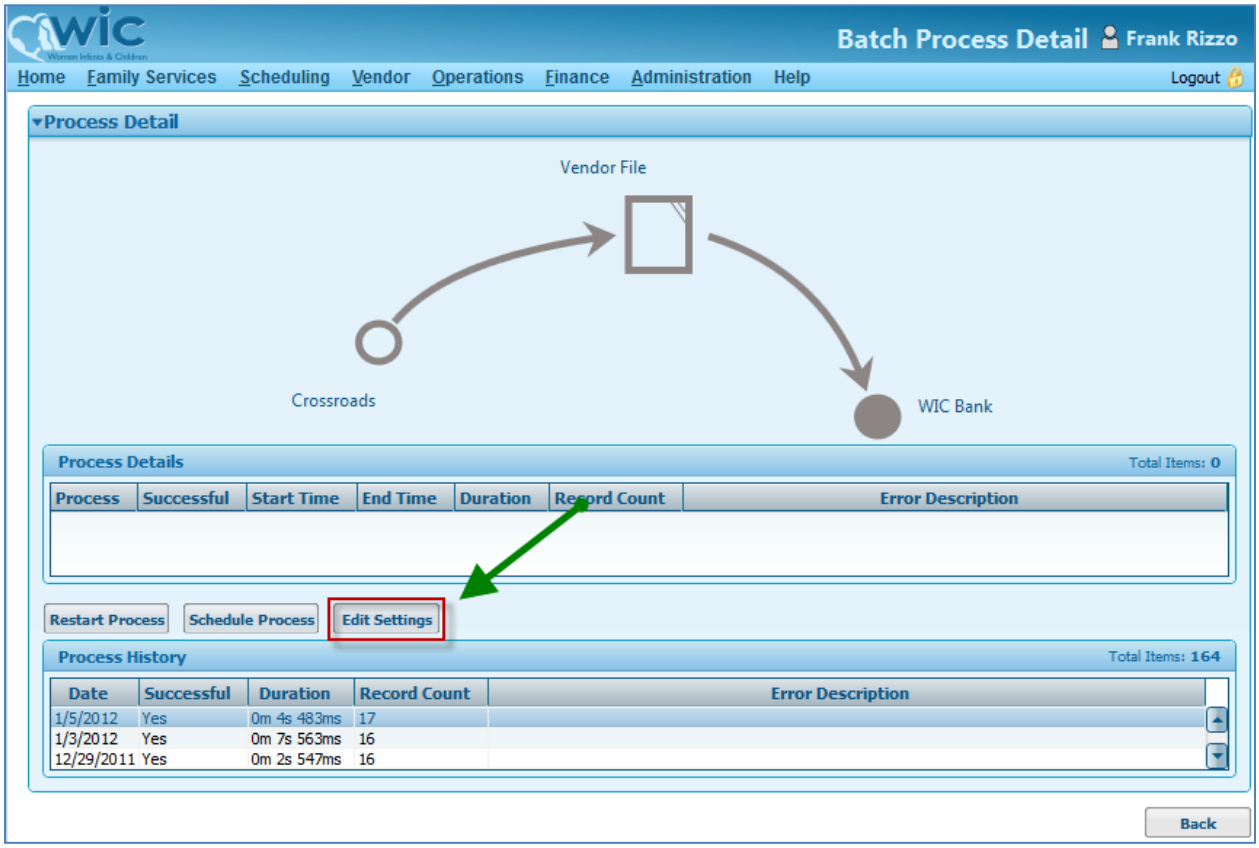



2. Click **Restart Process**. The process starts automatically with no further prompting.

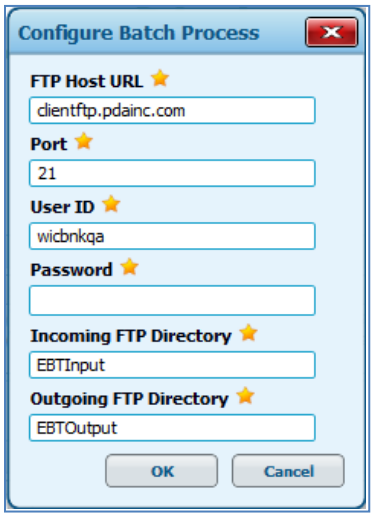
## Task C. Configuring External Batch Processes

Complete the following steps to perform this task:

1. Access Batch Process Detail screen. (For details, refer to Task A of the current scenario.)

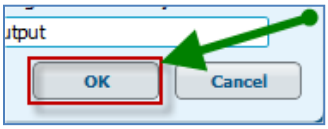



2. Click **Edit Settings**. The Configure Batch Process screen displays.



The Edit Settings button is displayed for external processes only.

3. Edit the configuration settings as follows:
   - Enter the **FTP Host URL**.
   - Enter the **Port**.
   - Enter the **User ID**.
   - Enter the **Password**.
   - Enter the **Incoming FTP Directory**.
   - Enter the **Outgoing FTP Directory**.
4. Click **OK**.




## Congratulations!

You have successfully viewed system process summaries, restarted batch processes, and configured batch processes.

# CONFIGURATION

## Managing the Process Schedule

### Overview

The Automated Processing Schedule List screen is used to manage the schedules for all automated system tasks or batch processes. You will use this screen to indicate the frequency, start time, and end time for each system task.

While the individual system tasks each have different functions, the process used to manage the automation schedules for these tasks is the same.

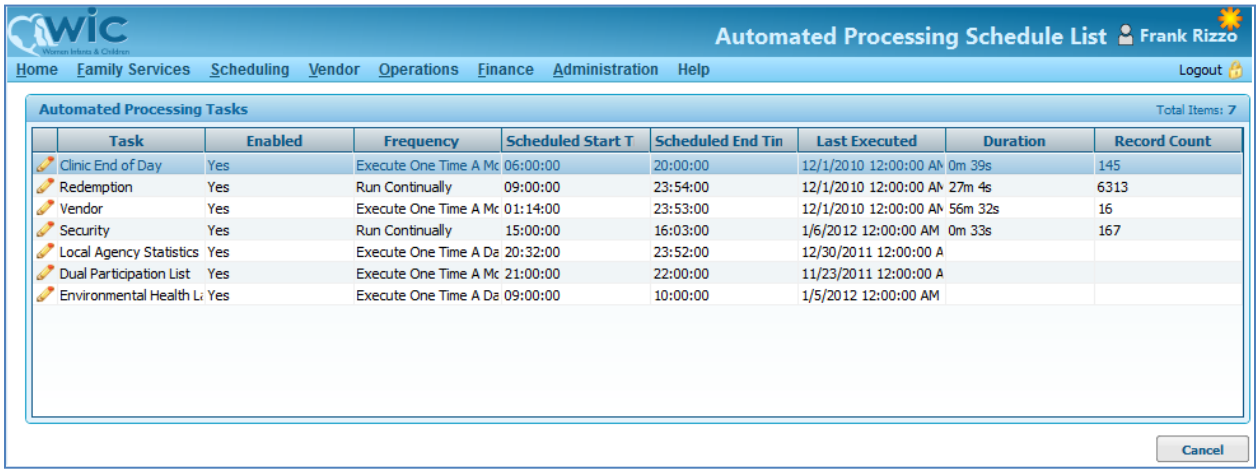
This process includes the following task:

Task A. Modifying Task Automation Schedules

## Task A. Modifying Task Automation Schedules

Complete the following steps to perform this task:

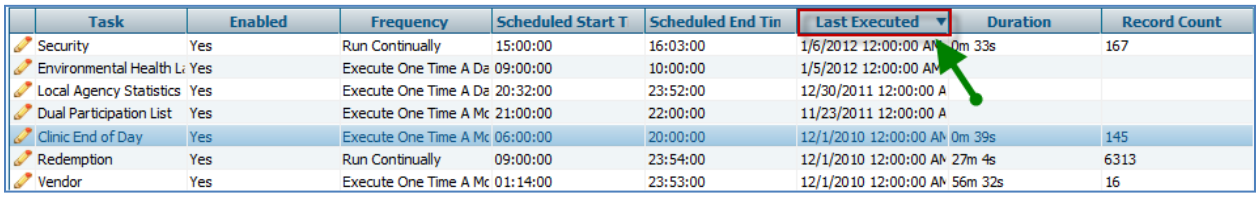
1. From the Home screen, go to **Administration à Configuration à Manage Process Schedule**. The Automated Processing Schedule List screen displays.


Automated Processing Schedule List
Frank Rizzo
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
Automated Processing Tasks
Total Items: 7
Task
Enabled
Frequency
Scheduled Start T
Scheduled End Tin
Last Executed
Duration
Record Count
Clinic End of Day Yes Execute One Time A Mc 06:00:00 20:00:00 12/1/2010 12:00:00 AM 0m 39s 145
Redemption Yes Run Continually 09:00:00 23:54:00 12/1/2010 12:00:00 AM 27m 4s 6313
Vendor Yes Execute One Time A Mc 01:14:00 23:53:00 12/1/2010 12:00:00 AM 56m 32s 16
Security Yes Run Continually 15:00:00 16:03:00 1/6/2012 12:00:00 AM 0m 33s 167
Local Agency Statistics Yes Execute One Time A Da 20:32:00 23:52:00 12/30/2011 12:00:00 A
Dual Participation List Yes Execute One Time A Mc 21:00:00 22:00:00 11/23/2011 12:00:00 A
Environmental Health La Yes Execute One Time A Da 09:00:00 10:00:00 1/5/2012 12:00:00 AM
Cancel

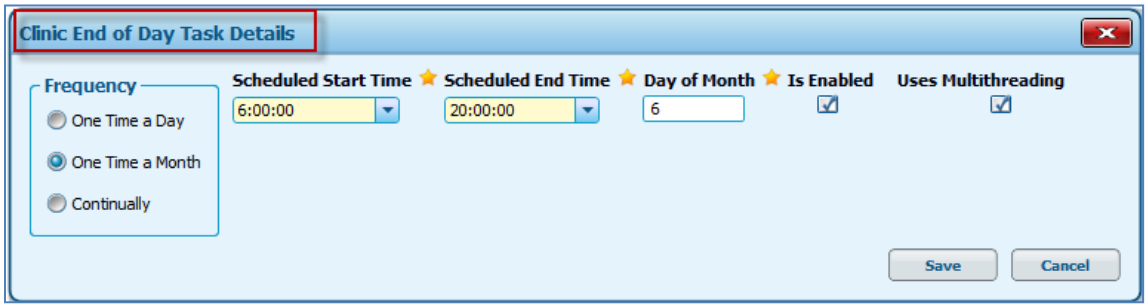
The Automated Processing Tasks grid lists all available tasks. It includes the Task name, an indication of whether the task is Enabled, the Frequency, Scheduled Start Time, Scheduled End Time, Last Executed date, Duration, and Record Count.

Click a column header to sort the items in the grid (example below).

Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid (not shown).

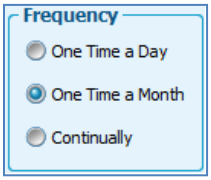

Task
Enabled
Frequency
Scheduled Start T
Scheduled End Tin
Last Executed
Duration
Record Count
Security Yes Run Continually 15:00:00 16:03:00 1/6/2012 12:00:00 AM 0m 33s 167
Environmental Health La Yes Execute One Time A Da 09:00:00 10:00:00 1/5/2012 12:00:00 AM
Local Agency Statistics Yes Execute One Time A Da 20:32:00 23:52:00 12/30/2011 12:00:00 A
Dual Participation List Yes Execute One Time A Mc 21:00:00 22:00:00 11/23/2011 12:00:00 A
Clinic End of Day Yes Execute One Time A Mc 06:00:00 20:00:00 12/1/2010 12:00:00 AM 0m 39s 145
Redemption Yes Run Continually 09:00:00 23:54:00 12/1/2010 12:00:00 AM 27m 4s 6313
Vendor Yes Execute One Time A Mc 01:14:00 23:53:00 12/1/2010 12:00:00 AM 56m 32s 16

2. Click the pencil icon to modify a task schedule. The Task Details screen displays.



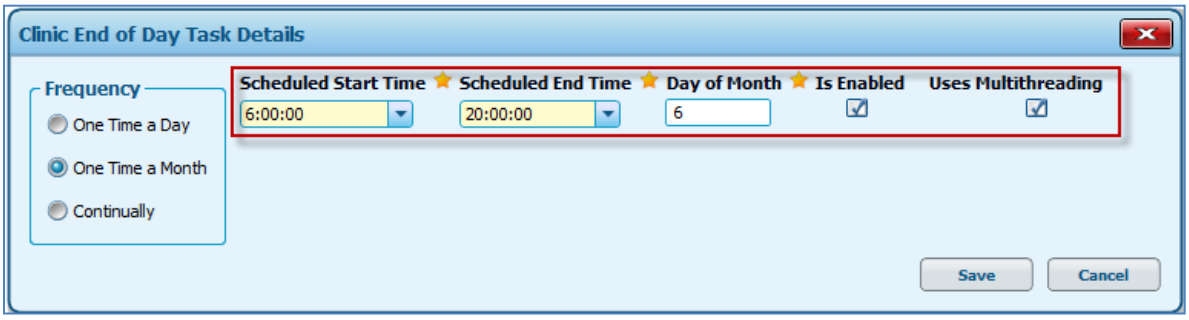
The name of the automated task is displayed in the title bar of the Task Details screen. While this title will vary by task, the other features on the screen will be the same for all tasks.

3. Under Frequency, select how often the task is automated: **One Time a Day**, **One Time a Month**, or **Continually**.

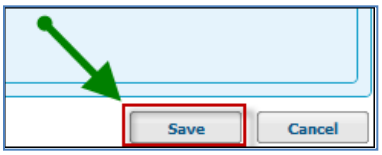



If a Frequency of **One Time a Day** or **Continually** is selected, the Day of Month will not be used. If a Frequency of **One Time a Month** is selected, the Day of Month is required.

4. Modify the additional Task Details as follows:
   - Enter or select the **Scheduled Start Time**.
   - Enter or select the **Scheduled End Time**.
   - Enter the **Day of Month**, as needed.
   - Check **Is Enabled**, as needed.
   - Check **Uses Multithreading**, as needed.




5. Click **Save**. A status message displays.




## Congratulations!

You have successfully viewed automated processing tasks and modified task automation schedules.

# MANAGE EDUCATION

## Adding, Editing, Deleting, and Viewing Education Details

### Overview

The Manage Education screen allows each user to view, enter, and edit education items, such as certification or training courses. This screen is specific to each user and displays only the education items for the currently logged in individual. When education items are added to this screen, they will be associated with only the currently logged in user's ID.

This process includes the following tasks:

Task A. Adding New Education Details

Task B. Viewing and Modifying Education Details

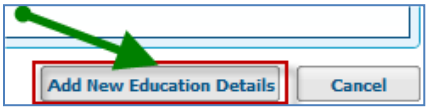
Task C. Deleting Education Items

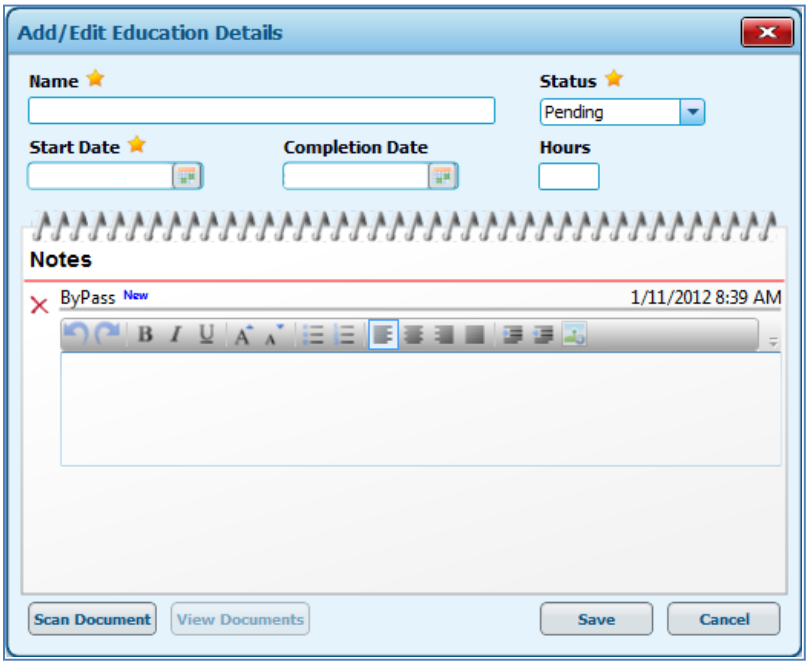
## Task A. Adding New Education Details

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Manage Education**. The Manage Education screen displays.

2. Click **Add New Education Details**. The Add/Edit Education Details screen displays.



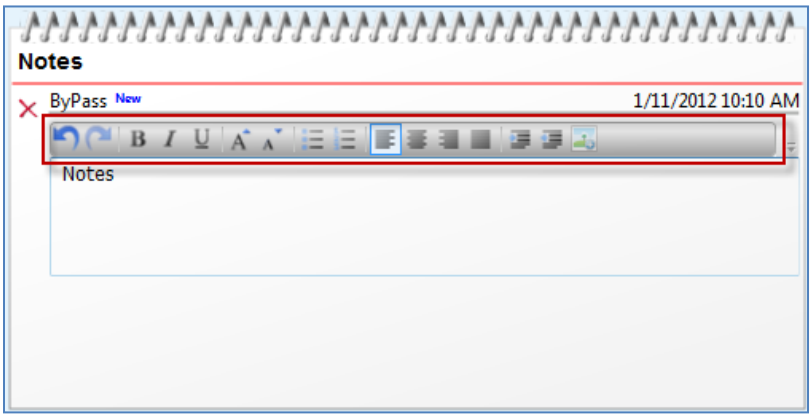
3. Enter the education details as follows:

   - Enter the **Name**.

This is the title or description of the education item (training course, certification class, etc.).

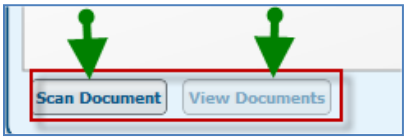
   - Select the **Status**.
   - Enter or select the **Start Date**.
   - Enter or select the **Completion Date**, as needed.
   - Enter the **Hours**, as needed.
   - Enter **Notes**, as needed.

Use the toolbar functions to format the notes. You can apply styles (bold, italics, underline), increase or decrease the font size, add bullets or numbering, etc.

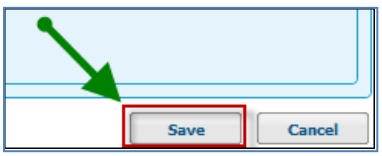



To scan documents for this education item, click **Scan Document**. The Scan Documents screen displays. Note that a document scanner must be connected in order to utilize this function.

If documents have previously been scanned, click **View Documents**. The Scan Documents screen displays.




4. Click **Save**. A status message displays.



## Task B. Viewing and Modifying Education Details

Complete the following steps to perform this task:

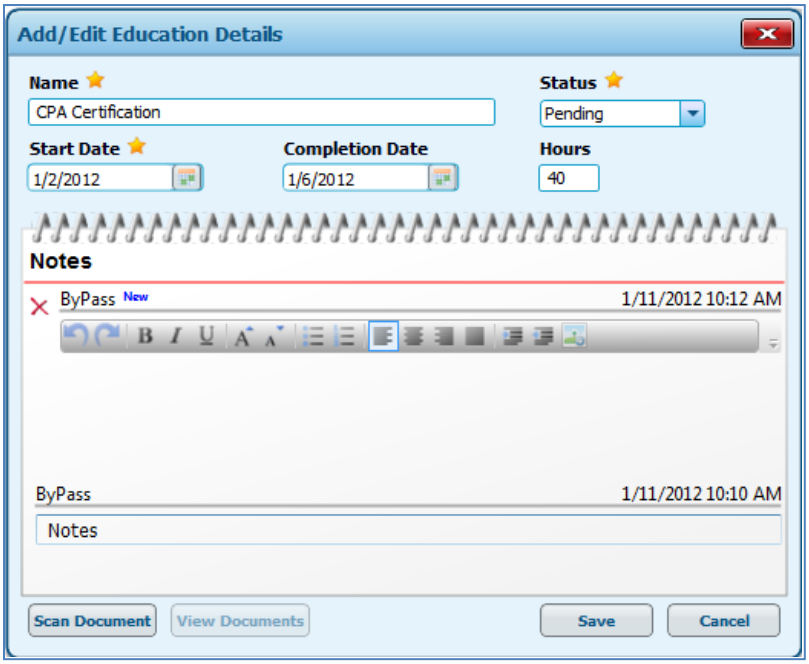
1. From the Home screen, go to **Administration à Manage Education**. The Manage Education screen displays.

The user Education Details grid lists all education items associated with the user, and includes the Status, Education Name, Start Date, Completion Date, and Hours.

Click a column header to sort the items in the grid.

Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

2. Click the pencil icon to view and modify education details. The Add/Edit Education Details screen displays.

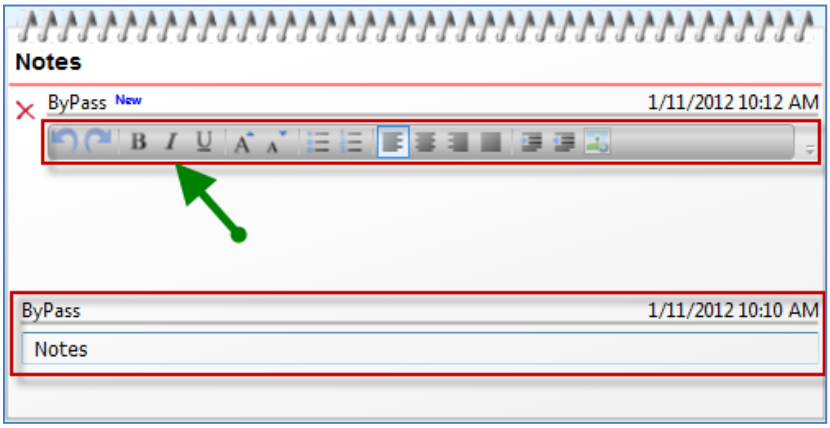



3. Modify the education details as follows:

- Enter or edit the **Name**.
- Select the **Status**.
- Select or edit the **Start Date**.
- Select or edit the **Completion Date**.
- Enter or edit the **Hours**.
- Enter **Notes**, as needed.

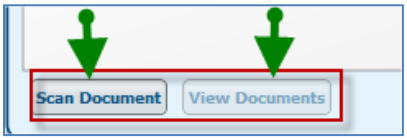
Use the toolbar functions to format the notes. You can apply styles (bold, italics, underline), increase or decrease the font size, add bullets or numbering, etc.

Previously added notes are dated and listed at the bottom of the Notes section. These notes cannot be modified.

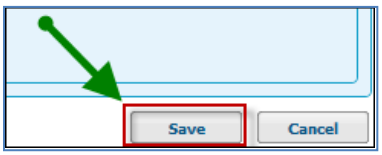



To scan documents for this education item, click **Scan Document**. The Scan Documents screen displays. Note that a document scanner must be connected in order to utilize this function.

If documents have previously been scanned, click **View Documents**. The Scan Documents screen displays.




4. Click **Save**. A status message displays.

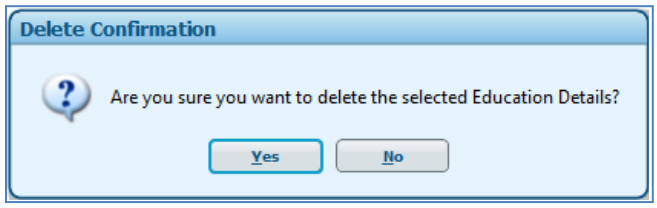


## Task C. Deleting Education Items

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Manage Education**. The Manage Education screen displays.

2. Click the delete icon ✕ to delete an existing education item. A confirmation message displays.




3. Click **Yes**. The Manage Education screen will be updated and the selected item will be deleted.

## Congratulations!

You have successfully added new education item details, viewed and modified existing education items, and deleted existing education items.

# ADMINISTRATION

## Selecting Preferences

### Overview

The Preferences settings in the Administration menu allow you to choose from a series of options to designate the Crossroads WIC system color scheme, measurement units used, and tool tip display settings. Selections made here will be applied to all system users.

This process includes the following tasks:

Task A. Selecting a Color Scheme

Task B. Selecting Measurement Units

Task C. Selecting Tool Tip Display Settings

### Task A. Selecting a Color Scheme

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Preferences à Color Schemes**. The color scheme options display.

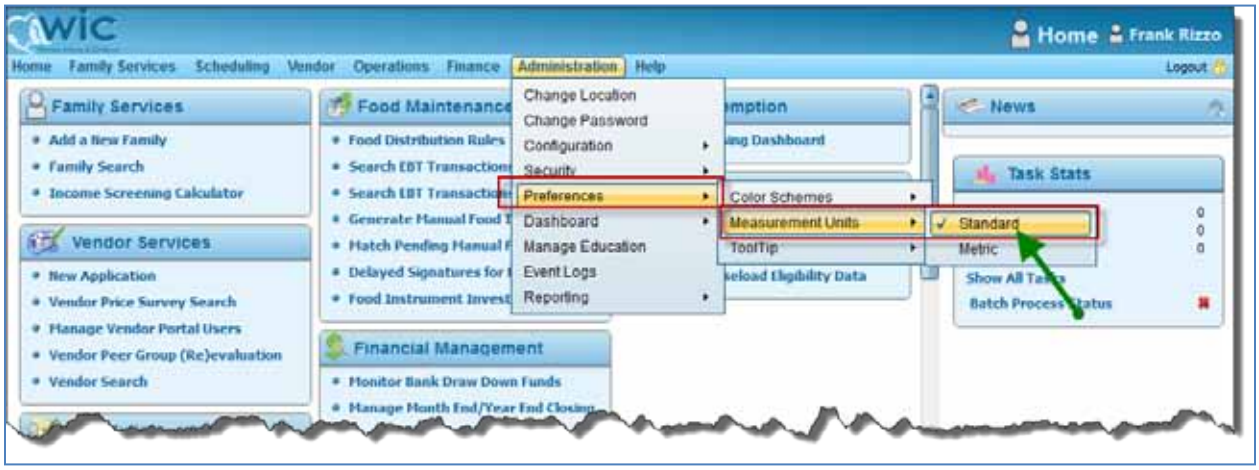
At this time, only one color scheme is available: **Crossroads**.

2. Click a color scheme selection: **Crossroads**. The color scheme will be automatically applied.

### Task B. Selecting Measurement Units

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Preferences à Measurement Units**. The measurement unit options display.




2. Click **Standard** or **Metric**. The measurement unit change will be automatically applied.

## Task C. Selecting Tool Tip Display Settings

Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Preferences à ToolTip**. The tool tip options display.

2. Click **Show when field is in focus** or **Show only on mouse hover**. The tool tip display change will be automatically applied.

If you select **Show when field is in focus**, the tool tips will be automatically displayed when a user clicks their mouse in a field or tabs to a field.

If you select **Show only on mouse hover**, the tool tips will be displayed only when a user hovers their mouse over a field.

## Congratulations!

You have successfully designated color schemes, measurement units, and tool tip display preferences.

# EVENT LOGS

## Searching and Reviewing Event Logs

### Overview

The Log Viewer screen allows you to search for errors generated by the system. You can then review the full details of the errors listed in your search results.

This process includes the following tasks:

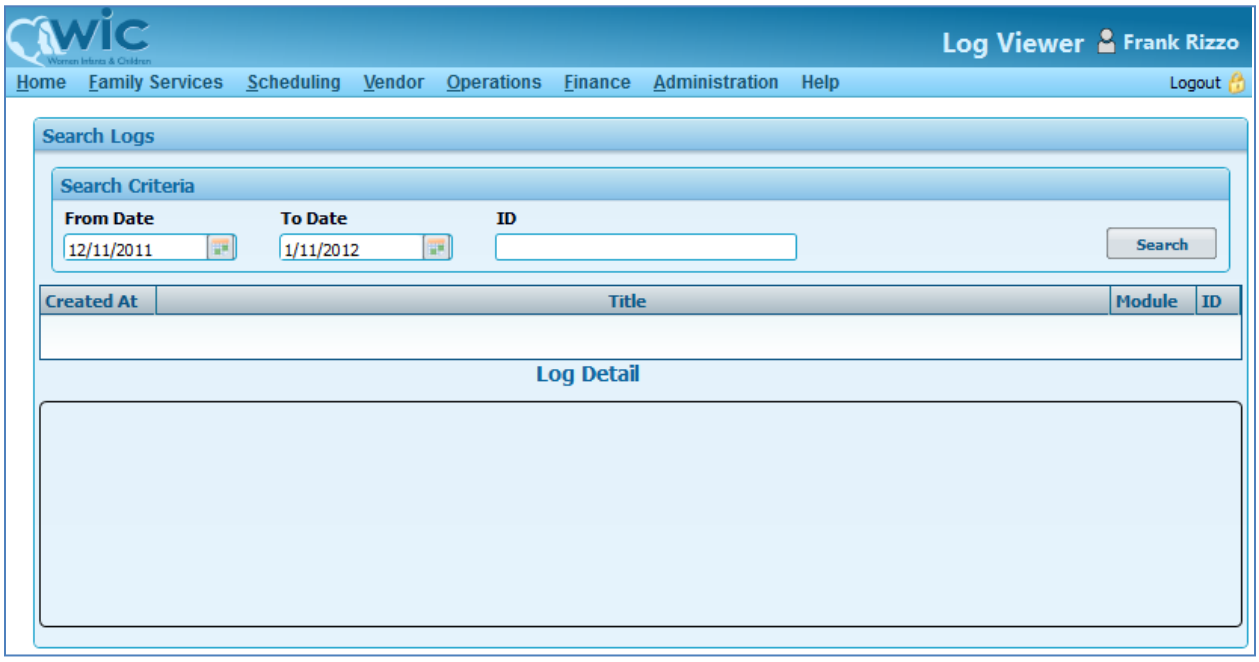
Task A. Searching for Event Logs

Task B. Reviewing Event Log Details

## Task A. Searching for Event Logs

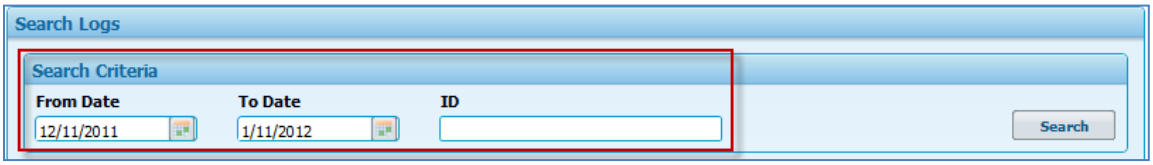
Complete the following steps to perform this task:

1. From the Home screen, go to **Administration à Event Logs**. The Log Viewer screen displays.

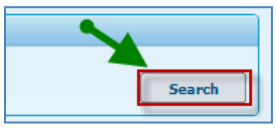


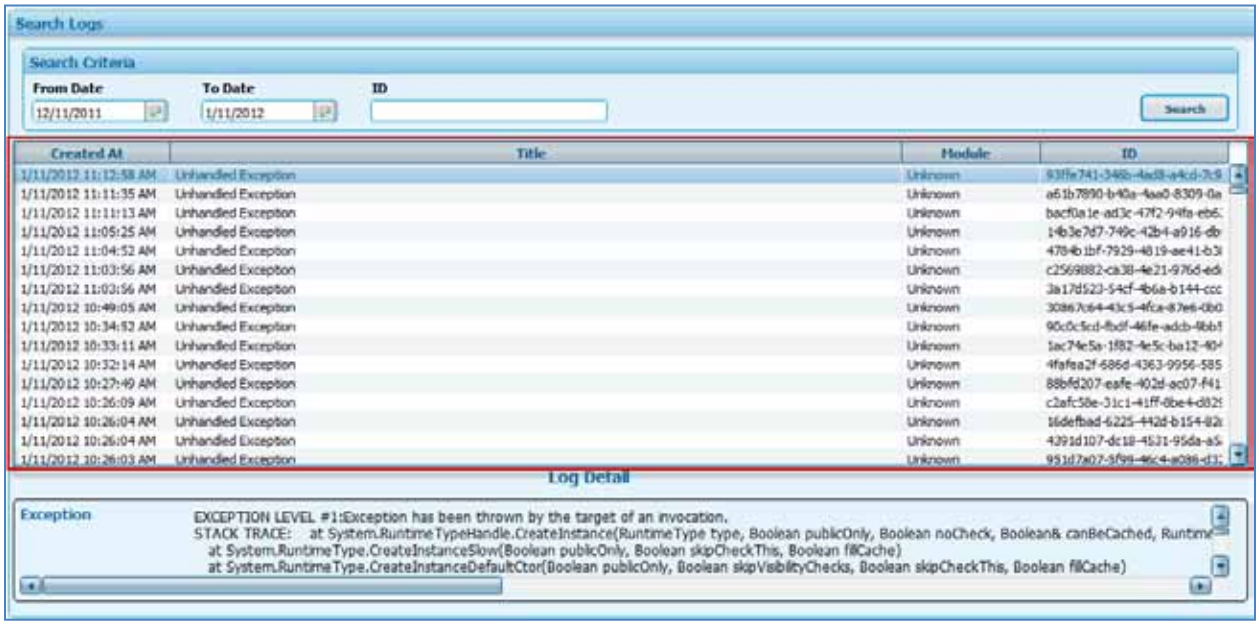

2. Under Search Logs, enter or select one or more Search Criteria options as follows:
   - Enter or select the **From Date**.
   - Enter or select the **To Date**.
   - Enter the **ID**.

The From Date defaults to one month prior to today's date. The To Date defaults to today's date.



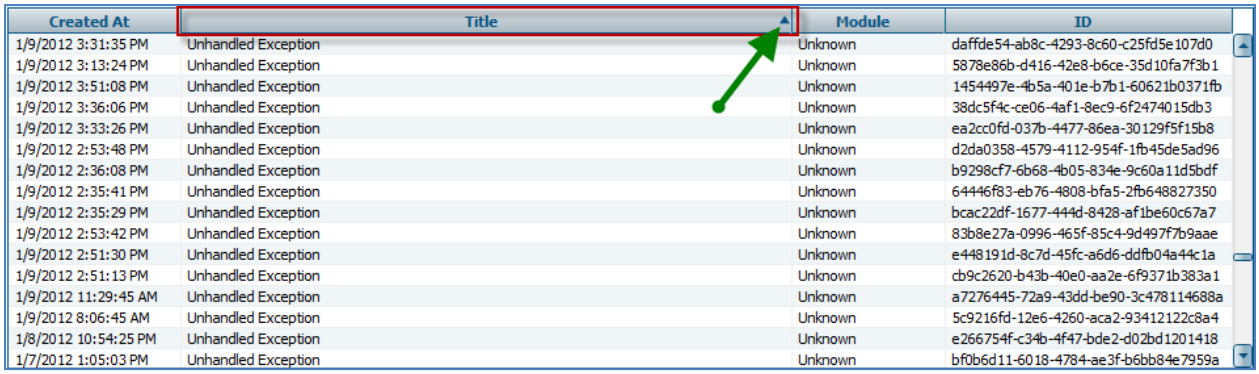

3. Click **Search**. The screen is refreshed and displays the results in the Search Logs grid.




Search Logs
Search Criteria
From Date
12/11/2011
To Date
1/11/2012
ID
Search
Created At
Title
Module
ID
1/11/2012 11:12:58 AM Unhandled Exception Unknown
1/11/2012 11:11:35 AM Unhandled Exception Unknown
1/11/2012 11:11:13 AM Unhandled Exception Unknown
1/11/2012 11:05:25 AM Unhandled Exception Unknown
1/11/2012 11:04:52 AM Unhandled Exception Unknown
1/11/2012 11:03:56 AM Unhandled Exception Unknown
1/11/2012 11:03:56 AM Unhandled Exception Unknown
1/11/2012 10:49:05 AM Unhandled Exception Unknown
1/11/2012 10:34:52 AM Unhandled Exception Unknown
1/11/2012 10:33:11 AM Unhandled Exception Unknown
1/11/2012 10:32:14 AM Unhandled Exception Unknown
1/11/2012 10:27:49 AM Unhandled Exception Unknown
1/11/2012 10:26:09 AM Unhandled Exception Unknown
1/11/2012 10:26:04 AM Unhandled Exception Unknown
1/11/2012 10:26:04 AM Unhandled Exception Unknown
1/11/2012 10:26:03 AM Unhandled Exception Unknown
Log Detail
Exception
EXCEPTION LEVEL #1:Exception has been thrown by the target of an invocation.
STACK TRACE: at System.RuntimeTypeHandle.CreateInstance(RuntimeType type, Boolean publicOnly, Boolean noCheck, Boolean& canBeCached, Runtime
at System.RuntimeType.CreateInstanceSlow(Boolean publicOnly, Boolean skipCheckThis, Boolean fillCache)
at System.RuntimeType.CreateInstanceDefaultCtor(Boolean publicOnly, Boolean skipVisibilityChecks, Boolean skipCheckThis, Boolean fillCache)

Click a column header to sort the results of the search (example below).

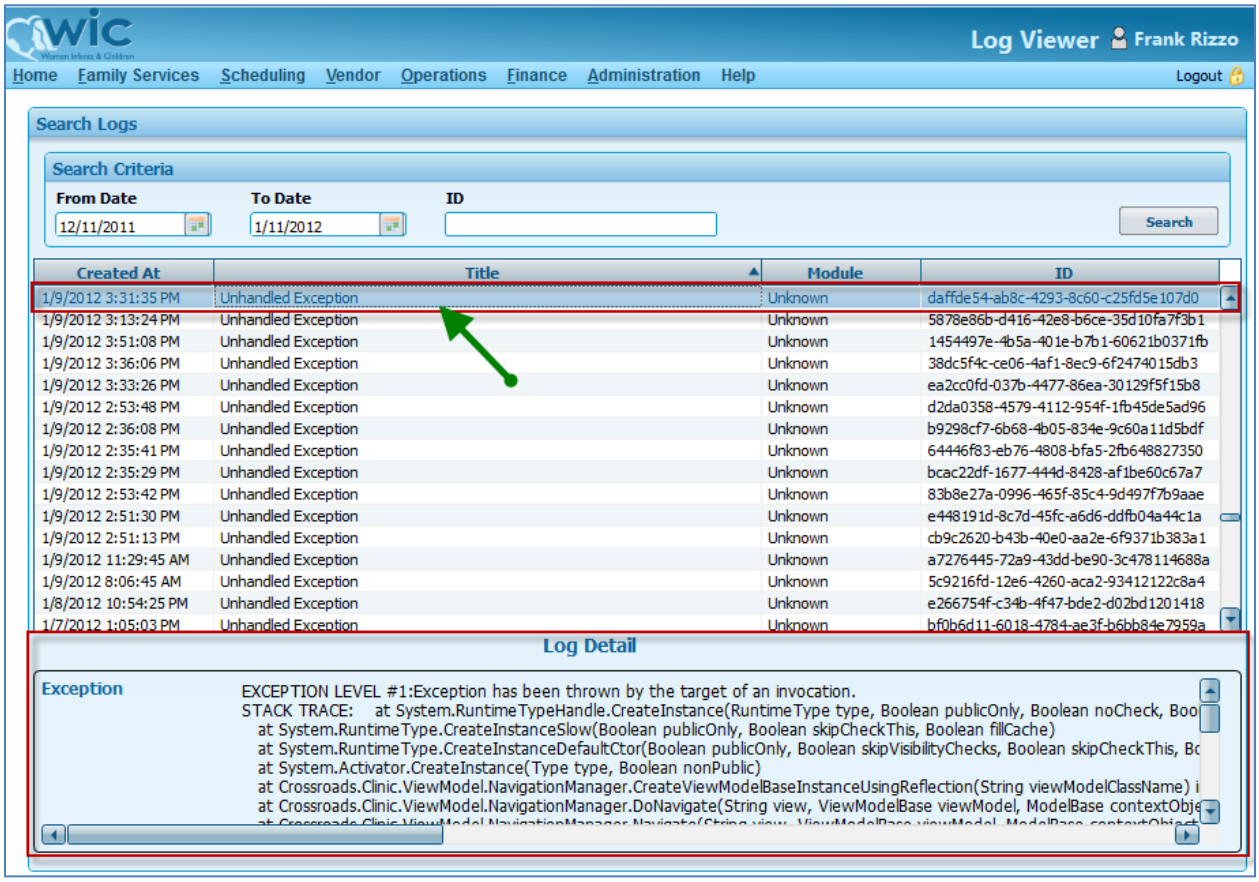
Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.


Created At
Title
Module
ID
1/9/2012 3:31:35 PM Unhandled Exception Unknown daffde54-ab8c-4293-8c60-c25fd5e107d0
1/9/2012 3:13:24 PM Unhandled Exception Unknown 5878e86b-d416-42e8-b6ce-35d10fa7f3b1
1/9/2012 3:51:08 PM Unhandled Exception Unknown 1454497e-4b5a-401e-b7b1-60621b0371fb
1/9/2012 3:36:06 PM Unhandled Exception Unknown 38dc5f4c-ce06-4af1-8ec9-6f2474015db3
1/9/2012 3:33:26 PM Unhandled Exception Unknown ea2cc0fd-037b-4477-86ea-30129f5f15b8
1/9/2012 2:53:48 PM Unhandled Exception Unknown d2da0358-4579-4112-954f-1fb45de5ad96
1/9/2012 2:36:08 PM Unhandled Exception Unknown b9298cf7-6b68-4b05-834e-9c60a11d5bdf
1/9/2012 2:35:41 PM Unhandled Exception Unknown 64446f83-eb76-4808-bfa5-2fb648827350
1/9/2012 2:35:29 PM Unhandled Exception Unknown bcac22df-1677-444d-8428-af1be60c67a7
1/9/2012 2:53:42 PM Unhandled Exception Unknown 83b8e27a-0996-465f-85c4-9d497f7b9aae
1/9/2012 2:51:30 PM Unhandled Exception Unknown e448191d-8c7d-45fc-a6d6-ddfb04a44c1a
1/9/2012 2:51:13 PM Unhandled Exception Unknown cb9c2620-b43b-40e0-aa2e-6f9371b383a1
1/9/2012 11:29:45 AM Unhandled Exception Unknown a7276445-72a9-43dd-be90-3c478114688a
1/9/2012 8:06:45 AM Unhandled Exception Unknown 5c9216fd-12e6-4260-aca2-93412122c8a4
1/8/2012 10:54:25 PM Unhandled Exception Unknown e266754f-c34b-4f47-bde2-d02bd1201418
1/7/2012 1:05:03 PM Unhandled Exception Unknown bf0b6d11-6018-4784-ae3f-b6bb84e7959a

## Task B. Reviewing Event Log Details

Complete the following steps to perform this task:

1. Click a row in the Search Logs grid. The full text of the error will be displayed under Log Detail.


WIC
Log Viewer
Frank Rizzo
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
Search Logs
Search Criteria
From Date
12/11/2011
To Date
1/11/2012
ID
Search
Created At
Title
Module
ID
1/9/2012 3:31:35 PM Unhandled Exception Unknown daffde54-ab8c-4293-8c60-c25fd5e107d0
1/9/2012 3:13:24 PM Unhandled Exception Unknown 5878e86b-d416-42e8-b6ce-35d10fa7f3b1
1/9/2012 3:51:08 PM Unhandled Exception Unknown 1454497e-4b5a-401e-b7b1-60621b0371fb
1/9/2012 3:36:06 PM Unhandled Exception Unknown 38dc5f4c-ce06-4af1-8ec9-6f2474015db3
1/9/2012 3:33:26 PM Unhandled Exception Unknown ea2cc0fd-037b-4477-86ea-30129f5f15b8
1/9/2012 2:53:48 PM Unhandled Exception Unknown d2da0358-4579-4112-954f-1fb45de5ad96
1/9/2012 2:36:08 PM Unhandled Exception Unknown b9298cf7-6b68-4b05-834e-9c60a11d5bdf
1/9/2012 2:35:41 PM Unhandled Exception Unknown 64446f83-eb76-4808-bfa5-2fb648827350
1/9/2012 2:35:29 PM Unhandled Exception Unknown bcac22df-1677-444d-8428-af1be60c67a7
1/9/2012 2:53:42 PM Unhandled Exception Unknown 83b8e27a-0996-465f-85c4-9d497f7b9aae
1/9/2012 2:51:30 PM Unhandled Exception Unknown e448191d-8c7d-45fc-a6d6-ddfb04a44c1a
1/9/2012 2:51:13 PM Unhandled Exception Unknown cb9c2620-b43b-40e0-aa2e-6f9371b383a1
1/9/2012 11:29:45 AM Unhandled Exception Unknown a7276445-72a9-43dd-be90-3c478114688a
1/9/2012 8:06:45 AM Unhandled Exception Unknown 5c9216fd-12e6-4260-aca2-93412122c8a4
1/8/2012 10:54:25 PM Unhandled Exception Unknown e266754f-c34b-4f47-bde2-d02bd1201418
1/7/2012 1:05:03 PM Unhandled Exception Unknown bf0b6d11-6018-4784-ae3f-b6bb84e7959a
Log Detail
Exception
EXCEPTION LEVEL #1:Exception has been thrown by the target of an invocation.
STACK TRACE: at System.RuntimeTypeHandle.CreateInstance(RuntimeType type, Boolean publicOnly, Boolean noCheck, Boo
at System.RuntimeType.CreateInstanceSlow(Boolean publicOnly, Boolean skipCheckThis, Boolean fillCache)
at System.RuntimeType.CreateInstanceDefaultCtor(Boolean publicOnly, Boolean skipVisibilityChecks, Boolean skipCheckThis, Bc
at System.Activator.CreateInstance(Type type, Boolean nonPublic)
at Crossroads.Clinic.ViewModel.NavigationManager.CreateViewModelBaseInstanceUsingReflection(String viewModelClassName) i
at Crossroads.Clinic.ViewModel.NavigationManager.DoNavigate(String view, ViewModelBase viewModel, ModelBase contextObje

2. Review the information under Log Detail.

The creation date, error title, module location, and error ID is displayed within the grid. Log details display, the error message text and stack trace information.

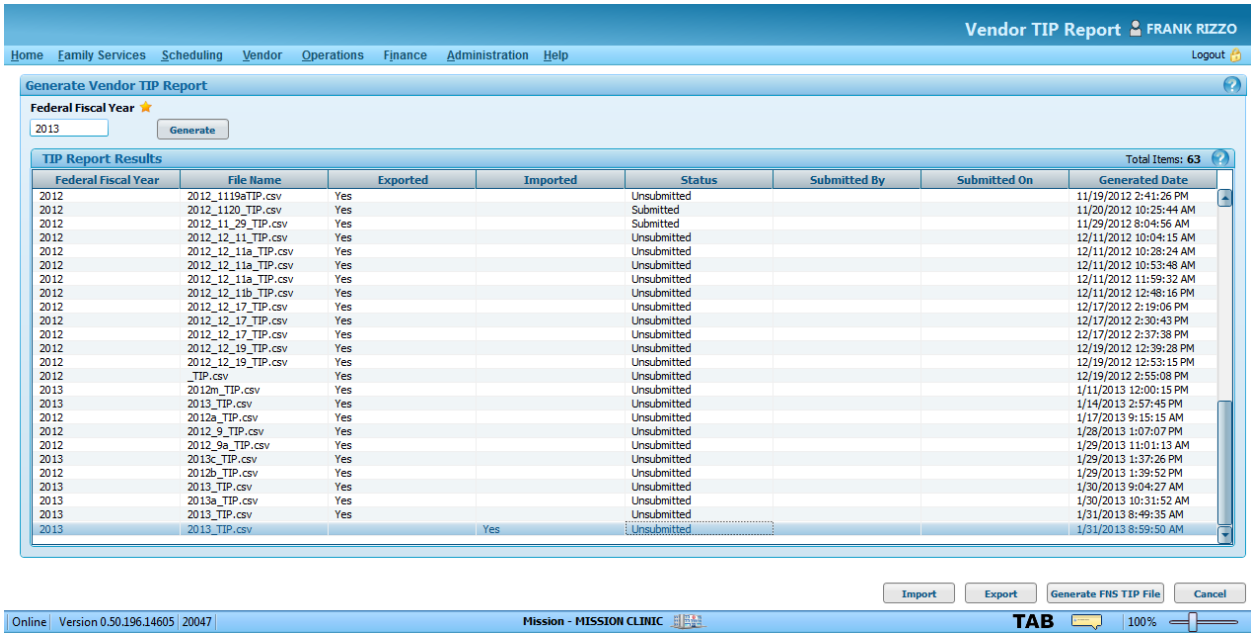
## Congratulations!

You have successfully searched for and reviewed error logs.

# Task C. Submitting the TIP Report to Food and Nutrition Service (FNS)

### Complete the following steps to perform this task:

1. While still on the **Vendor TIP Report** screen, select the file to be submitted by clicking on the row in the **TIP Report Results** grid.


Vendor TIP Report
FRANK RIZZO
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
Generate Vendor TIP Report
Federal Fiscal Year
2013
Generate
TIP Report Results
Total Items: 63
Federal Fiscal Year | File Name | Exported | Imported | Status | Submitted By | Submitted On | Generated Date
2012 | 2012_1119aTIP.csv | Yes | | Unsubmitted | | | 11/19/2012 2:41:26 PM
2012 | 2012_1120_TIP.csv | Yes | | Submitted | | | 11/20/2012 10:25:44 AM
2012 | 2012_11_29_TIP.csv | Yes | | Submitted | | | 11/29/2012 8:04:56 AM
2012 | 2012_12_11_TIP.csv | Yes | | Unsubmitted | | | 12/11/2012 10:04:15 AM
2012 | 2012_12_11a_TIP.csv | Yes | | Unsubmitted | | | 12/11/2012 10:28:24 AM
2012 | 2012_12_11a_TIP.csv | Yes | | Unsubmitted | | | 12/11/2012 10:53:48 AM
2012 | 2012_12_11a_TIP.csv | Yes | | Unsubmitted | | | 12/11/2012 11:59:32 AM
2012 | 2012_12_11b_TIP.csv | Yes | | Unsubmitted | | | 12/11/2012 12:48:16 PM
2012 | 2012_12_17_TIP.csv | Yes | | Unsubmitted | | | 12/17/2012 2:19:06 PM
2012 | 2012_12_17_TIP.csv | Yes | | Unsubmitted | | | 12/17/2012 2:30:43 PM
2012 | 2012_12_17_TIP.csv | Yes | | Unsubmitted | | | 12/17/2012 2:37:38 PM
2012 | 2012_12_19_TIP.csv | Yes | | Unsubmitted | | | 12/19/2012 12:39:28 PM
2012 | 2012_12_19_TIP.csv | Yes | | Unsubmitted | | | 12/19/2012 12:53:15 PM
2012 | _TIP.csv | Yes | | Unsubmitted | | | 12/19/2012 2:55:08 PM
2013 | 2012m_TIP.csv | Yes | | Unsubmitted | | | 1/11/2013 12:00:15 PM
2013 | 2013_TIP.csv | Yes | | Unsubmitted | | | 1/14/2013 2:57:45 PM
2012 | 2012a_TIP.csv | Yes | | Unsubmitted | | | 1/17/2013 9:15:15 AM
2012 | 2012_9_TIP.csv | Yes | | Unsubmitted | | | 1/28/2013 1:07:07 PM
2012 | 2012_9a_TIP.csv | Yes | | Unsubmitted | | | 1/29/2013 11:01:13 AM
2013 | 2013c_TIP.csv | Yes | | Unsubmitted | | | 1/29/2013 1:37:26 PM
2012 | 2012b_TIP.csv | Yes | | Unsubmitted | | | 1/29/2013 1:39:52 PM
2013 | 2013_TIP.csv | Yes | | Unsubmitted | | | 1/30/2013 9:04:27 AM
2013 | 2013a_TIP.csv | Yes | | Unsubmitted | | | 1/30/2013 10:31:52 AM
2013 | 2013_TIP.csv | Yes | | Unsubmitted | | | 1/31/2013 8:49:35 AM
2013 | 2013_TIP.csv | | Yes | Unsubmitted | | | 1/31/2013 8:59:50 AM
Import
Export
Generate FNS TIP File
Cancel
Online
Version 0.50.196.14605
20047
Mission - MISSION CLINIC
TAB
100%

2. Click **Generate FNS TIP File**. A standard Windows Create File screen displays. The file is saved as a TXT file.
3. Click **Save**. A success message displays and the **Status** column displays a status of **Submitted**.

## Congratulations!

You have successfully completed the **Manage TIP Report** process.

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